

**Tourism statistics in the
European Statistical System**
2008 data

2010 edition

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Luxembourg: Publications Office of the European Union, 2010

ISBN 978-92-79-15906-0

ISSN 1977-0375

DOI 10.2785/50703

Cat. No. KS-RA-10-010-EN-N

Theme: Industry, trade and services

Collection: Methodologies and working papers

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Preface

Europe is a major tourist destination, and six of the Member States of the EU are among the world's top ten destinations for holiday-makers. As a result, tourism plays an important role in terms of the EU's economic and employment potential, while also presenting social and environmental implications; these twin characteristics drive the demand for reliable and harmonised statistics within this field.

Since the recognised role of tourism as a tool of development and socio-economic integration can be better ensured through knowledge of the basic related statistics, Council Directive 95/57/EC of 23 November 1995 on the collection of statistical information in the field of tourism has laid down a system of tourism statistics. This legal basis requires the national governments of the EU Member States to provide a set of comparable tourism statistics on a regular basis.

The aim of this paper is to present a broad overview of the tourism-related statistics available at the level of the European Union on the basis of the latest results. The focus is on data at EU level, but the analysis also includes data at the Member State level and cross-country comparisons of the tourism indicators. Besides the core tourism statistics data compiled on the basis of the Directive, the article also includes results from other fields of official statistics that may be relevant for analysing tourism in Europe.

This paper is based on a contribution made by Eurostat to a monograph on tourism in the European Union prepared by the *Instituto de Estudios Turísticos (IET)* in the framework of the Spanish Presidency of the EU.

Christophe Demunter,
Head of section, tourism statistics

I. Introduction

Tourism is an important economic activity in the European Union (EU) with a high potential to contribute to higher employment and economic growth as well as to development and socioeconomic integration, including in rural, peripheral or underdeveloped areas.

Statistics in this field are not only used to monitor tourism-specific policies; they also play a role in the wider context of regional policy and sustainable development. Council Directive 95/57/EC on the collection of statistical information in the field of tourism organises the system of tourism statistics in the European Union. These statistics are collected and compiled by the national statistical authorities and disseminated by Eurostat.

Over the past decades, the importance of tourism for European businesses and for European citizens has been steadily growing.

In 2008, an estimated 1.6 billion tourism nights were spent in hotels and similar establishments in the EU, and that figure exceeds 2.3 billion nights if other types of collective accommodation are also included.

In 2008, EU citizens made more than 1 billion tourism trips with overnight stays.

According to estimates made by the European Commission's Directorate General for Enterprise and Industry, tourism accounts for about 4% (or 500 billion euro) of the Community's GDP.

Recent statistics showed that the tourist accommodation sector employs 2.3 million persons in the EU, while total employment in the tourism industry in the European Union is estimated to be between 12 and 14 million persons.

After a brief introduction to the framework for tourism statistics in the context of the European Statistical System (chapter II), this article will discuss participation in tourism by residents of the EU (chapter III) and the trips made and the characteristics of those trips (chapter IV). After presenting the perspective from the "demand side", the focus will shift to accommodation statistics, the so-called "supply side" (chapter V), before moving to indicators relating to employment in the accommodation sector based on labour market statistics (chapter VI) and information on tourism receipts and expenditure extracted from balance of payments statistics (chapter VII).

II. Data sources and availability

Tourism refers to the activity of visitors taking a trip to a main destination outside their usual environment, for less than a year, for any main purpose, including business, leisure or other personal reasons, other than to be employed by a resident entity in the place visited. The current official statistics are limited to overnight stays, and the possibilities for including statistics relating to same-day visits are being examined.

Council Directive 95/57/EC of 23 November 1995 on the collection of statistical information in the field of tourism organises the European Statistical System of tourism statistics. This system consists of two main components: statistics relating to capacity and occupancy in collective tourist accommodation, on the one hand, and statistics relating to tourism demand on the other. The former are collected in most Member States via surveys filled in by accommodation establishments, while the latter are in most cases collected by means of traveller surveys at the border or via traditional household surveys.

Statistics on the *capacity of collective tourist accommodation* include the number of establishments, the number of bedrooms and the number of bed places, and are available by type of establishment or by region. These statistics are compiled annually.

Statistics on the *occupancy of collective tourist accommodation* refer to the number of arrivals (at accommodation establishments) and the number of nights spent by residents and non-residents, broken down by type of establishment or by region. Both annual and monthly series are available. Statistics on the use of bed places (occupancy rates) are also compiled.

Statistics on *tourism demand* look at the participation in tourism, i.e. the number of persons in the population that make at least one trip of at least four overnight stays during the reference period (quarter, year), but also at the number of tourism trips made (and the number of nights spent on those trips), broken down by tourism-related variables such as country of destination, month of departure, length of stay, type of organisation of the trip, mode of transport, type of accommodation or expenditure, but also broken down by socio-demographic explanatory variables such as age or gender. Annual as well as quarterly series are available.

Besides the 'pure' tourism statistics, the picture is complemented by data from other sources of official statistics. These statistics include data on employment in the tourism accommodation sector (source: Labour Force Survey) broken down by working time (full/part time), working status, age, level of education, gender, permanency and seniority of work with the same employer (annual and quarterly data) or data tourism receipts and expenditure (source: Balance of Payments). Furthermore, transport statistics (e.g. air passenger transport) and structural business statistics can give additional information about both tourism flows and the economic performance of certain tourism-characteristic sectors.

III. Participation in tourism

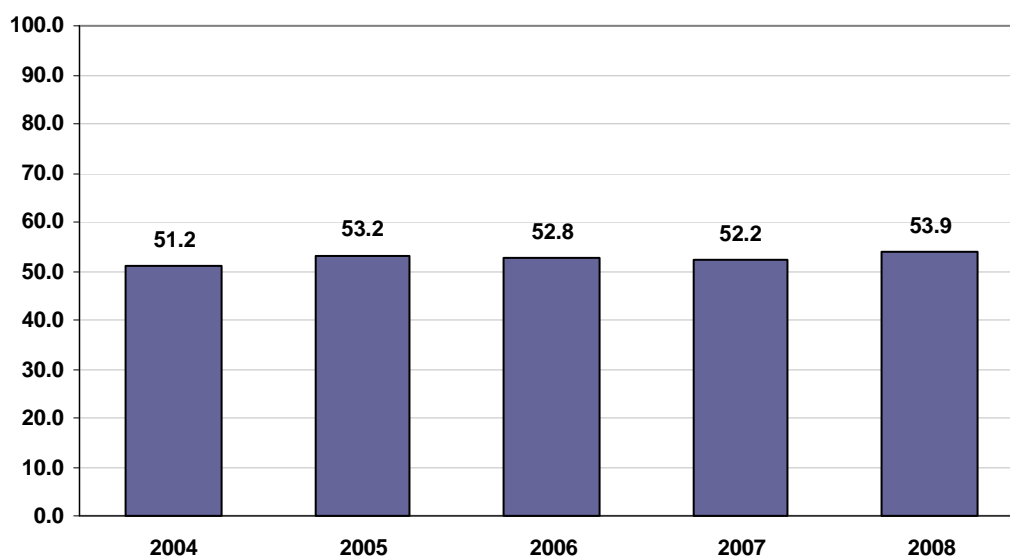
The *participation in tourism*, sometimes referred to as the *tourism propensity*, is defined as the share of the population in a country that makes at least one holiday trip of a specified minimum number of overnight stays during a given reference period. In the analysis below, the first section looks at the share of the population that made at least one holiday trip of at least *four* overnight stays during the reference *year*. The second paragraph refers to *quarterly* data and also looks at the share of the population that made at least one holiday trip of at least *one* overnight stay. Owing to restrictions on data collection, the information is limited to the population aged 15 and over.

The statistics on participation in tourism are highly relevant for evaluating the social dimension of tourism. In the context of recent policy programmes promoting "*tourism for all*", these statistics show how many EU citizens are involved in tourism. Naturally, it should be kept in mind that not all so-called *non-tourists* or *non-holiday makers* can be considered as being 'excluded' from tourism. Indeed, while some of the non-tourists are not travelling for reasons linked to their financial situation, physical disabilities or a shortage of free time due to work or family reasons, others may simply not be interested in making holiday trips.

III.1 More than half of the people living in the European Union go on holidays

Over the past decades, going on holidays has become a key moment during the year for many households or individuals. Holidays give people the opportunity to take a break from their usual private and/or professional environment or present a chance to discover other parts of their own country, other countries in Europe or even other parts of the world. In this sense, tourism can contribute to bringing people from different cultures together and to fostering mutual respect between different communities.

Graph 1: Participation in tourism, EU-27, 2004-2008



Source: Eurostat, *Tourism Statistics*.

Notes: (1) Share of the population aged 15 or over that made at least one holiday trip of 4 nights or more during the reference year; (2) EU-27 excluding BG, CY, LU, MT, RO, SE, SK (incomplete or unreliable data).

In the period 2004 to 2008, the percentage of the EU population (aged 15 or more) that made at least one holiday trip of at least four overnight stays was just over 50%, and reached 53.9% in 2008 (see Graph 1). This average for the EU as a whole hides large differences across the Member States (see Table 1). The share of the population that made at least one holiday trip, regardless of the destination, of 4 nights or more in 2008 ranged from 7.1% in Bulgaria to more than three quarters in Luxembourg (77.9%) and Cyprus (89.7%).

During 2008, 27.5% of the EU residents *only* made (one or more) domestic trips, while 16.5% *only* made (one or more) trips abroad. Just under one in ten EU residents (9.8%) made both domestic *and* outbound trips in the course of the reference year 2008. As a result, 37.3% made domestic trips and 26.3% made outbound trips. The available data clearly show the impact of the geographical location of one's residence. Especially in southern countries and/or countries with important seaside tourism destinations, domestic trips tend to be very popular. In Bulgaria, Greece, Spain, France, Italy, Portugal, Romania and Croatia, more than 3 out of 4 people who went on holidays in 2008 only made trips within their country of residence. Residents of smaller or more centrally or northerly located countries appear to prefer foreign destinations - the extreme case being Luxembourg, where less than 1 percent of the population spend their holidays within the Grand-Duchy.

Age has only a relatively limited influence on participation in tourism (see Table 1). Only the group of persons aged 65 and over tends to have a lower tourism intensity. In 2008, less than half of this group (45.0%) participated in tourism.

Table 1: Participation in tourism, 2008, by type of trip and by age group

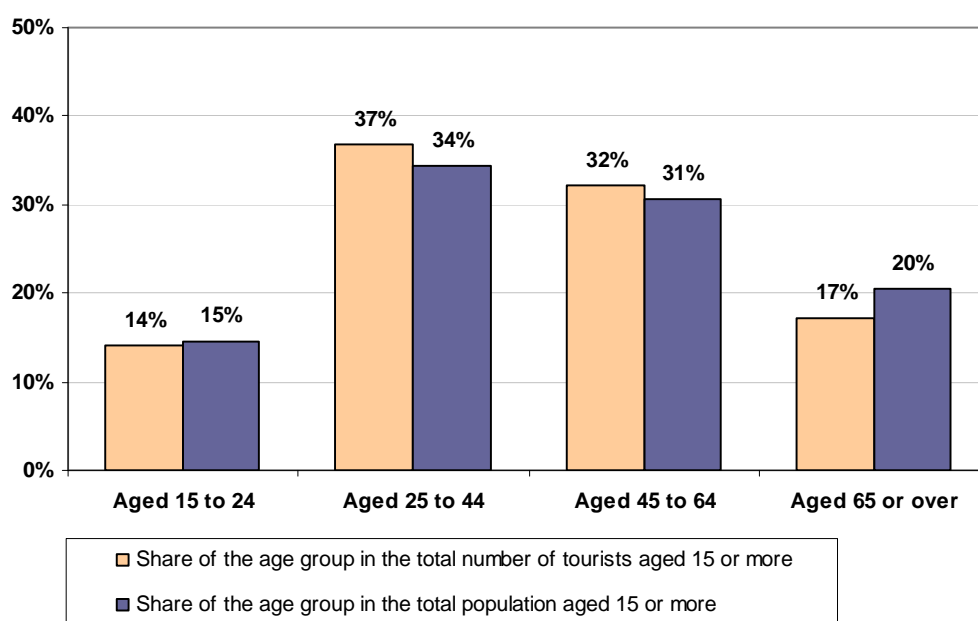
	Share of the population that takes part in tourism (i.e. at least one holiday trip of 4 nights or more during the year)							
	Share of the total population (aged 15 or more), by type of trip (%)				Share by age group, any type of holiday trip (%)			
	Any holiday trip	Only domestic trip(s)	Only outbound trip(s)	Domestic and outbound trip(s)	15-24 years	25-44 years	45-64 years	65 years or over
EU-27	53.9	27.5	16.5	9.8	51.5	57.6	56.7	45.0
BE	46.9	5.2	36.6	5.1	43.6	48.5	55.6	33.4
BG	7.1	5.5	1.6	<1	11.1	10.0	5.1	2.5
CZ	51.6	24.5	15.1	12.0	59.1	61.9	49.6	27.1
DK	61.9	9.7	44.8	7.4	69.4	66.8	67.7	37.7
DE	63.1	22.6	28.8	11.7	59.7	64.3	66.2	59.1
EE	33.7	6.0	19.9	7.8	41.5	41.0	33.5	15.3
IE	:	:	:	:	:	:	:	:
EL	42.8	36.3	5.7	<1	53.1	48.8	41.8	28.0
ES	43.3	32.8	5.6	5.0	43.8	44.5	47.4	34.7
FR	67.6	46.6	6.0	14.9	53.1	73.3	69.2	67.0
IT	48.9	35.6	7.1	6.2	55.8	59.5	48.5	29.8
CY	89.7	20.0	69.7	<1	:	:	:	:
LV	20.0	10.2	9.7	<1	25.9	22.5	18.8	12.2
LT	36.4	8.1	27.0	1.3	33.8	56.6	29.7	13.1
LU	77.9	<1	77.1	<1	76.6	78.8	82.0	69.7
HU	51.1	34.7	11.7	4.7	48.5	56.2	54.0	39.0
MT	:	:	:	:	:	:	:	:
NL	69.6	13.3	26.6	29.8	67.9	69.7	75.7	59.6
AT	61.1	10.6	18.5	32.0	64.7	62.2	64.5	51.5
PL	36.5	23.4	7.9	5.3	49.3	42.8	31.3	18.7
PT	17.0	12.5	3.6	<1	17.0	19.0	17.2	13.3
RO	28.8	24.6	4.0	<1	:	:	:	:
SI	59.7	11.6	37.5	10.6	74.9	66.8	61.3	31.6
SK	52.2	18.7	31.1	2.3	46.5	58.8	57.1	31.7
FI	58.3	25.8	14.4	18.1	62.6	60.5	67.6	35.7
SE	:	:	:	:	:	:	:	:
UK	57.9	20.0	29.2	8.7	43.2	57.9	67.8	54.5
HR	35.1	23.6	6.5	5.0	56.6	47.0	26.4	13.4
NO	71.8	16.7	37.8	17.3	71.1	79.2	79.7	44.6

Source: Eurostat, *Tourism Statistics*.

Notes: (1) Share of the population aged 15 or over that made at least one holiday trip of 4 nights or more during the reference year; (2) EU-27 excluding BG, CY, LU, MT, RO, SE, SK (incomplete or unreliable data); (3) Country abbreviations: see Endnotes.

Graph 2 shows that, while the oldest age group accounted for 20% of the total population aged 15 or more, it brought in around 17% of the tourists. The middle groups (25 to 44 years and 45 to 64 years) tended to be slightly over-represented. The phenomenon of the so-called 'ageing society', combined with the knowledge that the current "65-plus" generation did not always grow up with a household budget for tourism and with the fact that people stay healthy longer, might mean that the travellers aged 65 or more will become an important growth segment for the tourism market in the decades to come. In most of the countries where the overall participation is relatively low compared to the EU average, the youngest age group had the highest tourism intensity in 2008 (only Lithuania and Portugal showed a different pattern, with the highest participation in the 25 to 44 age group). The relatively high take-up of tourism by the younger generation could mean that, in the future, these countries will catch up with the other European countries in terms of tourism participation.

Graph 2: Age distribution of tourists versus age distribution of total population (aged 15 or more), EU-27, 2008

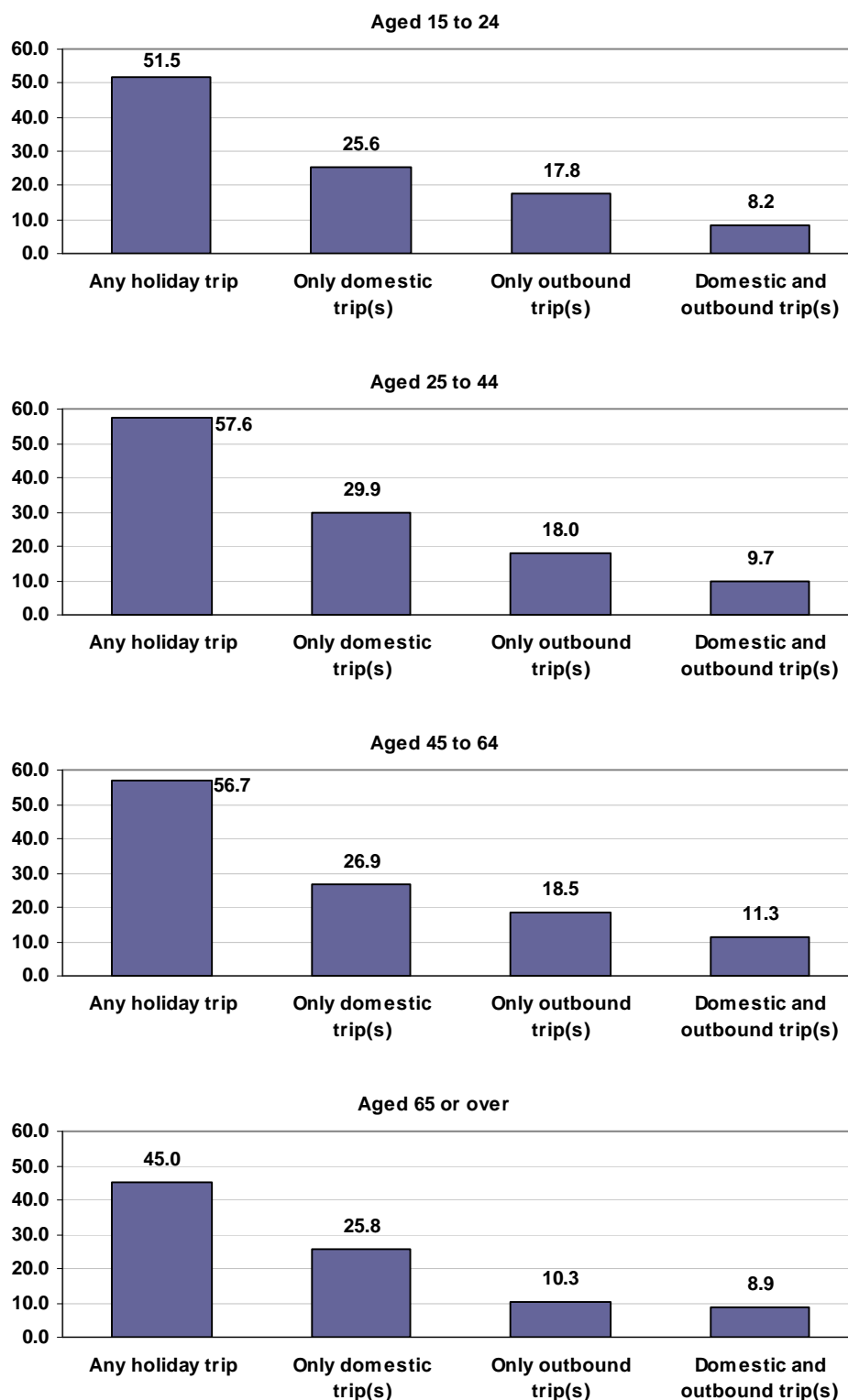


Source: Eurostat, *Tourism Statistics*.

Notes: (1) Population aged 15 or over that made at least one holiday trip of 4 nights or more during the reference year; (2) Population: 2007 data; (3) EU-27 excluding BG, CY, LU, MT, RO, SE, SK (incomplete or unreliable data).

When looking at the participation in tourism by age group, broken down by destination (see Graph 3), the pattern appears to be relatively stable. In 2008, around two out of three persons involved in tourism (69%) had made at least one domestic trip of a minimum of four nights, while around half of the persons involved in tourism (49%) had made at least one outbound trip of a minimum of four nights. This observation applied more or less to each of the age groups shown in Graph 3. Only in the oldest age group, i.e. citizens aged 65 or more, were domestic trips relatively more important: 77% made domestic trips, while only 43% made outbound trips during the reference year 2008.

Graph 3: Participation in tourism, EU-27, 2008, by type of trip and by age group



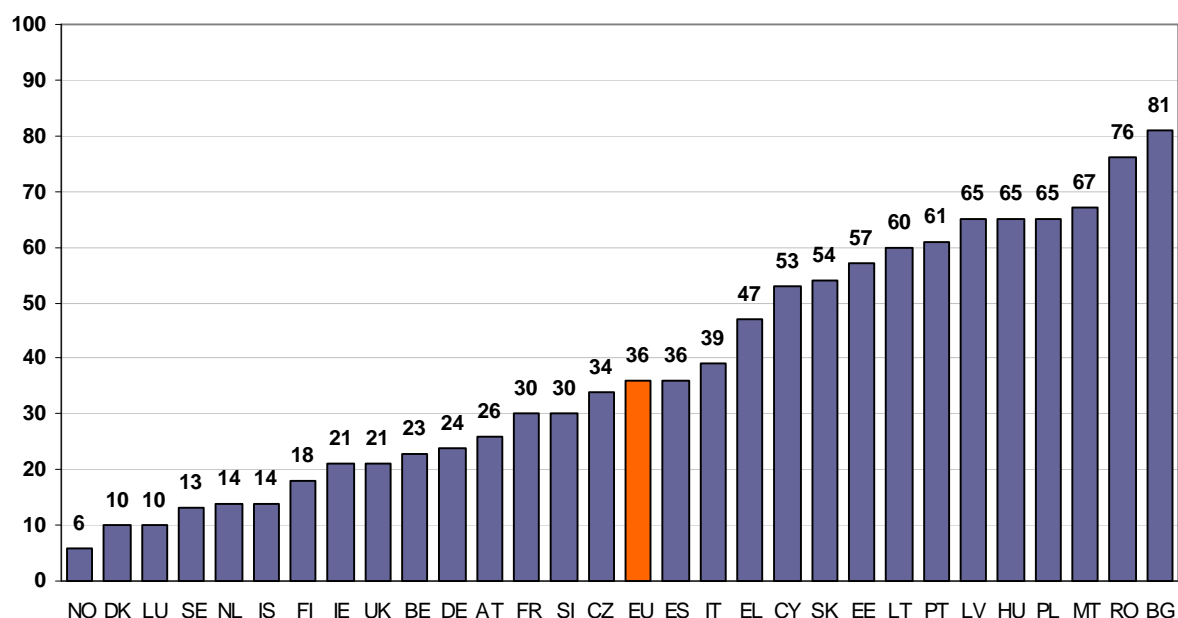
Source: Eurostat, Tourism Statistics.

Notes: (1) Population that made at least one holiday trip of 4 nights or more during the reference year; (2) EU-27 excluding BG, CY, LU, MT, RO, SE, SK (incomplete or unreliable data).

III.2 More than one in three households in the EU can't afford to go on holidays

It was mentioned in the introduction to this chapter that the social dimension of tourism has attracted more attention in recent years. While the earlier section attempted to give an insight into participation in tourism in the European Union, this section includes data on the reasons for not participating in tourism. In the context of the statistics on income and living conditions (EU-SILC), a set of indicators related to material deprivation has been defined. One of these indicators is related to tourism and gives the share of households that cannot afford to pay for one week of annual holiday away from home during a reference year. The data for the most recent year for which data for all Member States are available, namely the reference year 2007, are shown in Graph 4.

Graph 4: Share of households that are unable to afford paying for one week annual holiday away from home, 2007



Source: Eurostat, *Statistics on Income and Living Conditions (EU-SILC)*.

Notes: (1) The data in this graph is not necessarily comparable with or complementary to the data in Table 1, due to a difference in reference year (2008, 2007), a difference in timeframe (one week, at least 4 nights) and a difference in statistical unit (households, individuals).

On average, 36% of the households in the EU appeared to have budgetary constraints that prevented them from going on holidays for at least one week during 2007. As was the case for the tourism statistics in Table 1, big differences can be observed across Europe. In Norway, Denmark and Luxembourg, 10% or less of the households could not afford a one-week holiday, while in Romania and Bulgaria more than 3 out of 4 households reported that their financial situation made it difficult for them to go on holidays at all. With the exception of Slovenia (30%) and Czech Republic (34%), who perform slightly better on this indicator of material deprivation as compared to the EU average, more than half of the households in all Member States that have joined the European Union since 2004 appeared to have difficulties in taking part in tourism for financial reasons.

III.3 In all European countries, except Estonia, the highest participation in tourism is recorded in the third quarter

This section deepens the analysis by looking at quarterly data on the participation in tourism. Using quarterly data it is possible to take trips of at least four nights or trips of at least one night as a reference point.

Table 2 shows that, in 2008, the highest participation in tourism in the European Union was in the third quarter of the year. Nearly half of the population aged 15 or over (46.7%) made at least one holiday trip with a minimum of one overnight stay in the period July to September, while 34.9% made at least one holiday trip with a minimum of four overnight stays during the same 3-month period. Not surprisingly, the summer months appeared to be the most popular period to go on holidays in all the Member States. The exception was Estonia, where the highest tourism intensity was recorded in the pre-summer period of April to June.

The pattern across Europe for quarterly data largely corresponds to the observations made above on the basis of Table 1. Again, large differences can be observed, ranging from lowest top season values of 17.1% and 20.5% for Romania and Bulgaria respectively to highest top season values for Luxembourg (67.9%), Finland (70.5%), Norway (72.1%) and Cyprus, where nearly 4 out of 5 residents (79.3%) reported that they had made a holiday trip with at least one overnight stay during the third quarter.

A number of Member States with relatively less favourable climatic conditions in the winter months recorded high tourism participation rates in the first and the fourth quarters of the year. More than 40% of the Irish, Luxembourgish, Finnish and Norwegian residents made trips with at least one overnight stay during the first quarter; the same can be observed for the fourth quarter. When considering only those who made trips of at least four overnight stays, the participation in tourism still exceeds 20% for these countries in the relevant quarters.

The biggest variation throughout the year was seen in Greece and Italy. In the former, participation in tourism was more than 6 times higher in the third quarter (39.5%) compared to the first quarter (6.6%). In Italy, the top season for going on holidays (third quarter, 38.5%) recorded a tourism intensity that was 5 times higher than the fourth quarter (7.4%).

III.4 Seasonality tends to be more of a decisive factor for people who make holiday trips of at least four overnight stays

In the European Union, the share of residents that made at least one holiday trip with a minimum of one overnight stay was 46.7% in the peak quarter, compared to 27.3% in the lowest quarter. Where participation in tourism is defined as the share of residents that took at least one holiday with a minimum of four overnight stays, the differences are more pronounced. In the third quarter, 34.9% had participated in tourism, while in the first and the fourth quarters the rates were down to 13.7% and 13.4% respectively (see Table 2 and Graph 5).

Graph 5 shows the breakdown by destination, i.e. tourism intensity in each quarter for domestic and outbound tourism respectively. The share of the population that went on holidays within their own Member State - regardless of the length of stay - was relatively high in all four quarters of 2008, ranging from 21.1% in the first quarter to 34.5% in the third quarter. When considering only the share of the population that made domestic trips of a minimum of four overnight stays, the differences are more pronounced: while 22.9% of the population participated in tourism in the third quarter, the share in all other quarters is below 10%.

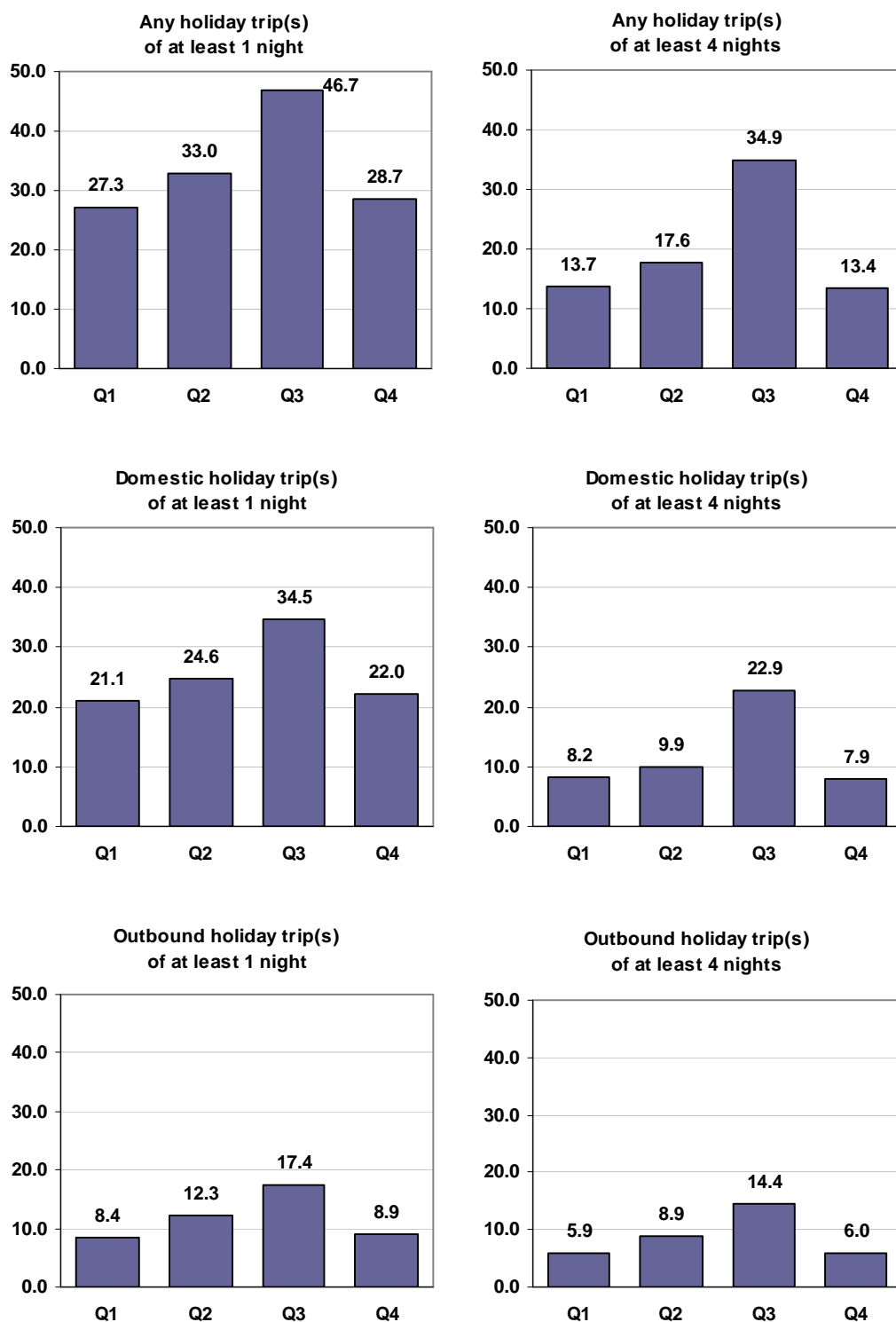
Table 2: Participation in tourism, 2008, by quarter and by minimum duration of the trip

	Share of the population that takes part in tourism (any holiday trip regardless of the destination) during the reference quarter							
	1st quarter		2nd quarter		3rd quarter		4th quarter	
	At least 1 trip of minimum 1 night	At least 1 trip of minimum 4 nights	At least 1 trip of minimum 1 night	At least 1 trip of minimum 4 nights	At least 1 trip of minimum 1 night	At least 1 trip of minimum 4 nights	At least 1 trip of minimum 1 night	At least 1 trip of minimum 4 nights
EU-27	27.3	13.7	33.0	17.6	46.7	34.9	28.7	13.4
BE	18.2	12.4	22.4	15.4	35.3	31.8	16.4	10.5
BG	8.4	3.1	8.6	3.2	20.5	15.5	13.6	5.1
CZ	35.2	10.3	41.8	14.4	56.0	42.5	31.0	10.7
DK	:	:	:	:	:	:	:	:
DE	38.2	15.4	49.5	23.1	58.7	37.6	45.9	19.5
EE	15.1	5.2	22.4	8.6	16.0	8.3	17.3	7.7
IE	50.1	27.5	53.7	35.8	66.9	51.0	54.0	27.2
EL	13.8	6.6	19.9	12.7	44.0	39.5	16.5	10.1
ES	27.5	15.9	23.1	9.1	39.1	30.5	23.4	8.9
FR	37.3	22.7	44.0	28.6	60.2	50.6	34.4	19.4
IT	21.7	11.4	23.1	11.1	45.4	38.5	18.8	7.4
CY	12.2	11.6	16.6	14.8	79.3	49.3	15.1	13.9
LV	13.1	3.3	20.5	5.0	32.3	9.8	20.9	5.3
LT	23.4	6.2	28.5	8.3	39.6	19.4	24.1	10.2
LU	44.6	23.6	48.7	25.5	67.9	52.4	42.9	25.4
HU	19.8	3.4	24.4	6.3	33.0	13.7	22.3	4.2
MT	:	:	:	:	:	:	:	:
NL	27.7	16.7	47.3	37.4	55.8	48.8	35.3	22.0
AT	29.7	17.7	33.0	20.7	53.7	42.7	31.1	17.0
PL	14.1	6.8	16.0	7.6	33.2	23.1	14.6	6.7
PT	:	:	:	:	:	:	:	:
RO	10.4	4.0	11.1	6.0	17.1	13.1	11.3	5.7
SI	21.1	8.9	26.9	13.0	50.9	43.5	22.7	9.4
SK	25.4	16.8	27.4	18.3	47.8	40.7	26.9	16.8
FI	58.3	27.6	60.7	25.5	70.5	38.9	56.1	21.7
SE	:	:	:	:	:	:	:	:
UK	24.8	13.0	36.1	21.8	43.1	29.5	30.3	15.0
HR	15.9	7.4	21.7	11.4	37.0	29.0	18.3	9.0
NO	49.7	31.0	51.5	28.9	72.1	58.1	42.1	22.6

Source: Eurostat, *Tourism Statistics*.

Notes: (1) Share of the population aged 15 or over that made at least one holiday trip of the specified minimum nights of nights during the reference quarter; (2) EU-27 excluding DK, MT, PT and SE (incomplete or unreliable data).

Graph 5: Participation in tourism, EU-27, 2008, by quarter and by destination and minimum duration of the trip



Source: Eurostat, *Tourism Statistics*.

Notes: (1) Share of the population aged 15 or over that made at least one holiday trip of the specified minimum nights of nights during the reference quarter; (2) EU-27 excluding DK, MT, PT and SE (incomplete or unreliable data).

IV. Tourism trips

The core part of the statistics on tourism demand relates to the *trips made by EU residents*, the characteristics of these trips and the socio-demographic characteristics of the tourists who made the trips(s). While the data on tourism trips includes information on business trips, the analysis in this chapter is confined to holiday trips, broken down by destination (e.g. domestic trips *versus* outbound trips) and length of the trip (e.g. 1 to 3 overnights stays as against 4 overnight stays or more).

The reader should bear in mind that the analysis in this chapter is made from a demand side perspective, i.e. the data at the level of the Member State refer to trips made by residents of this country (domestic trips and outbound trips), and not to inbound trips to this country by residents from other Member States (except for Graphs 9 and 10, see further).

IV.1 Residents of the European Union make more than 1 billion holiday trips per year

During the year 2008 (see Table 3), the number of holiday trips with overnight stays made by EU residents, regardless of the destination or the length of stay, exceeded 1 billion trips (1.04 billion trips). The highest number of trips was recorded in Germany (214.5 million trips) and France (212.6 million trips), followed by Spain (120.0 million trips) and the United Kingdom (119.2 million trips). These top-4 countries accounted for nearly two thirds (64.2%) of all holiday trips made by EU residents.

Slightly more than half of all holiday trips made in 2008 were short breaks of 1 to 3 nights (52.0%, or 549.7 million trips). The vast majority of these short breaks had a destination within the tourist's own Member State (89.2%). Short breaks to other Member States of the European Union represented 8.9% of all short holiday trips, while short trips outside the EU accounted for less than 2% of all short trips. As a share of the total number of holiday trips, short domestic trips represented 47.2%, while short trips to other Member States represented 4.7% (see Graph 6).

Only in Belgium and Luxembourg was the share of short trips abroad (within or outside the EU) higher than the share of short domestic trips. In Luxembourg, domestic trips accounted for less than 1% of the total number of holiday trips. Short domestic breaks were very common in Latvia and Finland, with shares of 70% and 69% respectively, and also in Spain (65%).

As already mentioned, short breaks seldom had a destination outside the European Union in 2008. Only in Latvia (5%) and Slovenia (13%) did the share of short trips outside the EU exceed 5% of all trips, most probably because of the proximity of the Russian Federation and Croatia respectively.


When focusing on long trips of a minimum of four overnight stays, the distribution was less skewed. However, domestic destinations appeared to dominate in this segment of tourism too. Long domestic trips accounted for 59% of the total number of long trips (and a 29% in the total number of holiday trips, regardless of the duration). Long trips abroad to EU countries represented 28% of the total number of long trips (and 13% of all trips), while long trips outside the EU represented 13% of the total number of long trips (and 6% of all trips).

Table 3: Holiday trips of EU residents (aged 15 and over), 2008, by duration and destination

	Number of holiday trips (in thousands)			Share by type of trip, broken down by duration and destination (percentage)					
	All holiday trips	Short holiday trips (1 to 3 nights)	Long holiday trips (4 nights or more)	Short domestic trips	Short trips to other EU Member States	Short trips outside the EU	Long domestic trips	Long trips to other EU Member States	Long trips outside the EU
EU-27	1 038 892	549 707	489 185	47	5	<1	29	13	6
BE	10 712	3 354	7 357	16	17	<1	12	43	13
BG	6 251	3 775	2 476	57	:	:	32	:	:
CZ	24 532	14 626	9 906	54	6	<1	20	13	8
DK	10 368	4 377	5 991	32	9	<1	15	31	11
DE	214 482	110 659	103 823	45	6	<1	21	19	8
EE	1 241	818	423	51	12	2	9	14	13
IE	11 839	6 022	5 817	38	12	<1	10	30	8
EL	13 561	5 627	7 934	40	<1	<1	50	5	3
ES	119 969	80 687	39 282	65	1	<1	28	3	2
FR	212 562	110 240	102 322	50	2	<1	41	4	3
IT	80 183	39 846	40 336	46	3	1	37	9	4
CY	1 704	813	891	42	4	1	11	32	9
LV	4 262	3 318	944	70	6	1	8	9	6
LT	3 813	2 418	1 395	50	8	6	14	14	8
LU	1 199	444	755	<1	35	2	<1	51	11
HU	22 155	15 010	7 144	61	6	1	20	9	3
MT	140	17	123	:	:	:	:	:	:
NL	29 563	10 243	19 320	24	10	<1	22	33	11
AT	15 426	6 857	8 569	31	12	2	21	21	14
PL	36 245	19 080	17 165	49	3	<1	35	10	3
PT	10 265	6 423	3 842	60	:	:	30	:	:
RO	10 275	4 800	5 474	46	:	:	46	:	:
SI	3 733	2 149	1 584	37	7	13	11	7	24
SK	6 724	2 071	4 653	24	6	<1	34	19	16
FI	30 115	23 326	6 789	69	8	<1	15	5	2
SE	38 399	25 618	12 781	58	:	:	19	:	:
UK	119 176	47 089	72 087	32	7	<1	24	25	12
HR	6 721	3 557	3 164	40	8	5	32	9	5
NO	16 800	9 650	7 150	45	:	:	20	:	:

Source: Eurostat, *Tourism Statistics*.

Notes: (1) EU-27 for number of holiday trips (absolute values): excluding domestic trips for MT; (2) EU-27 for share by type of trip (percentages): excluding BG, MT, PT, RO and SE (incomplete or unreliable data); (3) Data for DK, IT, MT and UK: 2007; (4) Data for PT and SE: 2006; (5) MT: data refers to estimates for outbound trips only (no information on domestic tourism available).

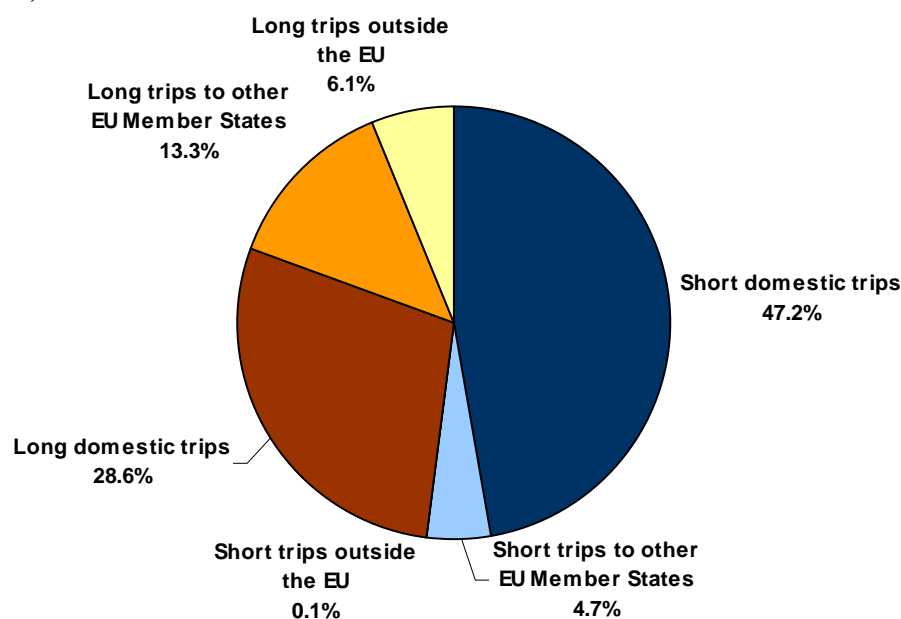


In only 10 of the 26 Member States for which data are available, the number of long trips exceeded the number of short trips made in the year 2008, but more than two out of three trips were long trips of a minimum of four nights in only two Member States (Belgium (67%) and Slovakia (69%)).

In a similar way to what was reported on participation in tourism (see paragraph III.3), the destination of Europeans' holidays revealed an important geographical factor. Whereas domestic trips accounted for more than 90% of the total number of holiday trips made by residents of southern or Mediterranean countries, such as Spain (93%), Romania (92%), France (91%), Greece (91%) or Portugal (90%), the own country was a holiday destination in less than half of the trips made by residents from more central or northern Member States – and often from smaller Member States like Luxembourg (less than 1%), Belgium (27%), Netherlands (47%), Denmark (48%) or Ireland (49%).

The data in Graph 7 show that Finland recorded the highest number of holiday trips *per capita* (6.9 trips per year). However, the bulk of these trips were short trips: on average, Finnish residents made 1.5 long trips in 2008. Residents of the EU, on average, made 2.4 holiday trips in 2008, regardless of the duration, and 1.1 trips of at least 4 overnight stays. Big differences were observed across Europe, with the average number of trips per resident aged 15 or more ranging – as mentioned – from 6.9 in Finland to less than 1 in Bulgaria (0.9) and Romania (0.6). The highest number of long holiday trips per inhabitant was recorded in France (2.0), closely followed by Luxembourg and Norway (both with 1.9).

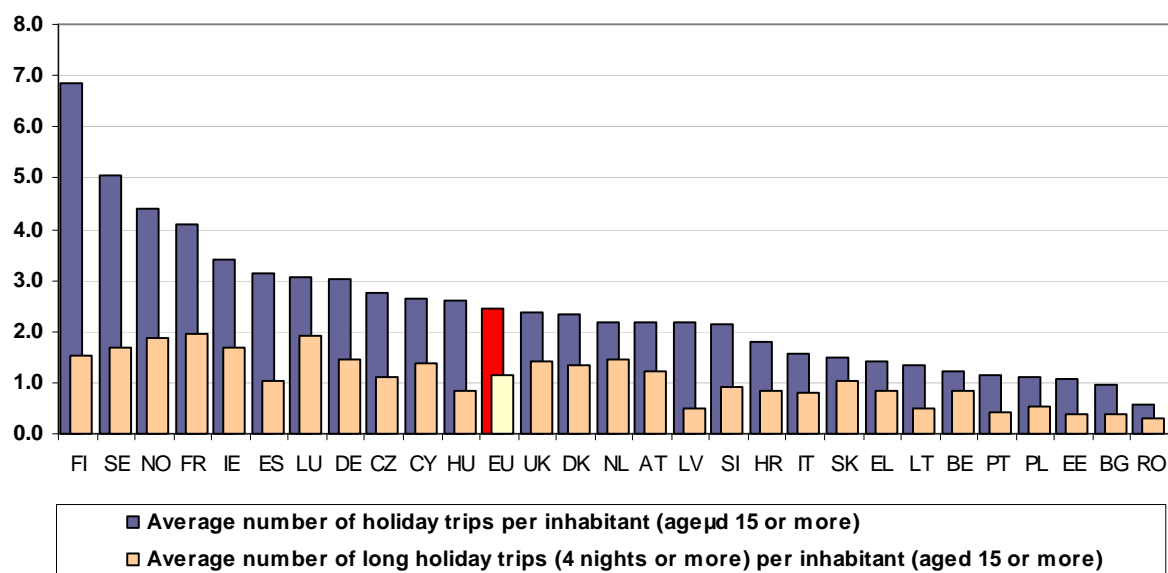
Graph 6: Holiday trips of EU residents (aged 15 and over), EU-27, 2008, by duration and destination (shares)



Source: Eurostat, Tourism Statistics.

Notes: (1) EU-27: excluding BG, MT, PT, RO and SE (incomplete or unreliable data); (2) EU-27 includes 2007 data for DK, IT, UK and 2006 data for PT, SE.

Graph 7: Number of holiday trips per inhabitant (aged 15 and over), 2008, by duration (ratio)



Source: Eurostat, Tourism Statistics.

Notes: (1) EU-27: excluding MT; (2) Data for DK, IT, MT and UK: 2007; (3) Data for PT and SE: 2006; (4) Population data: 2007; (5) The ratio gives the number of holiday trips per inhabitant of the country and not per inhabitant that participated in tourism.

IV.2 Short breaks have been the fastest growing segment over the past decade

The number of holiday trips made by EU residents increased during the period 1998-2008, with the increase being much greater in the case of short trips (see Table 4, based on data from 11 Member States). Indeed, while the number of trips (regardless of the duration) increased by 47.0% between 1998 and 2008, the actual *number* of short trips with 1 to 3 overnight stays increased by 74.9% over the same period. As a consequence, the *share* of short trips in the total number of holiday trips increased from 44% in 1998 to 53% in 2008 – an increase of 8 percentage points or 19 percent.

Looking at the changes in the behaviour or preferences of tourists as regards the destination of short holiday trips, Table 3 showed that nearly 9 out of 10 short holidays are spent within the individual's own country. Over the period 1998-2008, this segment grew by 75.3% and increased its market share from 40% to 48% of all holiday trips, a relative increase of 19%. The second fastest growing segment was that of short holiday trips abroad (+70.6%), which achieved a share of 4.7% in the total number of holiday trips made by EU residents.

The analysis tends to lead to the conclusion that Europeans have increased their number of holiday trips by adding short breaks to the traditional annual longer holidays. The growth in the number of short holidays applies to both domestic and outbound trips, the latter probably because of more attractive long distance train or airline connections or because of the enlargement of the internal market.

Table 4: Evolution of the number and of the share of different types of holiday trips of EU residents (aged 15 and over), EU-27, 1998- 2008

	Increase of the number of trips over the period 1998-2008	Share in the total number of trips			Change in 'market' share 1998-2008	
		1998	2005	2008	Absolute change (% points)	Relative change (%)
All holiday trips	47.0%	100%	100%	100%	-	-
Short holiday trips (1-3 nights)	74.9%	44%	50%	53%	8%	19%
Long holiday trips (4+ nights)	25.0%	56%	50%	47%	-8%	-15%
Domestic holiday trips	52.7%	74%	75%	77%	3%	4%
Outbound holiday trips	30.8%	26%	25%	23%	-3%	-11%
Short domestic holiday trips	75.3%	40%	45%	48%	8%	19%
Short outbound holiday trips	70.6%	4.1%	4.4%	4.7%	1%	16%
Long domestic holiday trips	26.1%	34%	30%	29%	-5%	-14%
Long outbound holiday trips	23.3%	22%	20%	18%	-4%	-16%

Source: Eurostat, Tourism Statistics.

Notes: (1) EU-27: aggregate data based on data from the 11 Member States for which data is available for 1998, 2005 and 2008 (BE, DK, DE, EL, ES, FR, IT, LU, PT, FI, UK). Trips made by residents of these 11 Member States represent 79% of the total number of holiday trips, therefore the figures can be slightly different from those printed in Table 3 based on all Member States (excepting MT) ; (2) EU-27 for 2008 includes 2007 data for DK, IT, UK and 2006 data for PT, SE.

IV.3 With a total of nearly 6 billion holiday nights, the average length of holiday trips is just under 6 nights

Paragraph IV.1 mentioned that residents of the European Union made over 1 billion holiday trips in the year 2008. Just over 786 million - or more than 75% - of those trips had a destination within the tourist's own Member State (see Table 5). While the outbound trips represented only 24% of all holiday trips, their share was significantly higher when looking at the number of nights spent (39%).

French tourists spent the highest number of nights on holiday trips (1.35 billion nights, of which 1.15 billion nights on domestic trips), followed by Germany (1.18 billion nights, of which 519.7 million nights on domestic trips). Domestic holiday trips in France accounted for almost one third (32%) of all nights spent on domestic holiday trips by EU residents. For the outbound holiday trips, Germany had the highest share of the total nights spent on outbound holiday trips by EU residents (28%, 658.4 million nights).

Filtering out the effect of the population of the country - by looking at the share of domestic and outbound nights in the total for each Member State – the number of outbound nights was (at least) three times higher than the number of domestic holiday nights in Luxembourg (99%, 8.6 million nights on outbound trips), Belgium (84%, 70.9 million nights) and Cyprus (79%, 9.4 million nights). At the other end of the spectrum, the share of outbound nights was relatively

low in Greece (12%, 12.5 million nights on outbound trips), Spain (13%, 74.7 million nights) and France (14%, 192.6 million nights).

By dividing the number of nights spent by the number of holiday trips, the average length of the trips can be calculated. The right hand part of Table 5 gives the average length of trips made by EU residents in 2008. Because of the data used, the analysis below refers to the average length in *nights*; however, the average length in nights can most probably be considered as a reliable proxy for the average length in days.

For the EU as a whole, holiday trips had an average length of 5.8 nights, with outbound trips more than twice as long compared to domestic trips (9.3 and 4.6 nights respectively).

The average length of holiday trips exceeded one week in five Member States: Belgium and Greece (7.8 nights), the Netherlands (7.7 nights), Luxembourg (7.2 nights) and Cyprus (7.0 nights). The shortest average length of holiday trips was recorded for residents of Finland (3.2 nights), Latvia (3.5 nights) and Hungary (3.9 nights). Not surprisingly, domestic trips accounted for a relatively high share of the total number of holiday trips made in the latter three countries.

In none of the European countries for which data are available did the average length of outbound trips exceed two weeks. On average, the longest outbound trips were recorded for Romania (13.0 nights), Cyprus (11.9 nights), Poland (11.5 nights) and the United Kingdom (10.8 nights). Outbound holiday trips lasted less than one week on average in Croatia (5.4 nights), Finland (5.8 nights), Slovenia (6.1 nights), Lithuania (6.8 nights) and Malta (6.9 nights).

Table 3 in paragraph IV.1 already showed that short trips of three overnight stays or less were the dominant segment in the total number of holiday trips made by EU residents in the course of 2008. Table 6 gives a more detailed breakdown of the holiday trips by duration.

In 2008, 80% of the holiday trips had a duration of 1 week or less, while only 7% of the trips spanned more than 2 weeks. The segment of trips of more than 4 weeks was insignificant for the EU as a whole, but also in all of the Member States for which data were available.

Also for this aspect of tourism trips, major differences could be observed across the European Union. In all but one of the Member States (Belgium), short trips of 3 or less overnight stays were dominant among the six categories of duration shown in Table 6. However, when taking a cut-off reference of one week, the data show that more than 9 out of 10 trips had a length of not more than one week in Finland (95%), Latvia (92%) and Hungary (91%), while around 1 out of 3 trips were longer than one week in Belgium (35%) and the Netherlands (33%). The latter two countries, together with Greece and Cyprus, were also the only Member States where more than 10% of all holiday trips had a duration of more than two weeks.

Table 5: Holiday trips, nights spent and average length of trips made by EU residents (aged 15 and over), 2008, by destination

	Number of holiday trips (in thousands)			Number of nights spent (in thousands)			Average length of holiday trips		
	All holiday trips	Domestic holiday trips	Outbound holiday trips	All holiday trips	Domestic holiday trips	Outbound holiday trips	All holiday trips	Dom. holiday trips	Outb. holiday trips
EU-27	1 038 892	786 190	252 700	5 982 995	3 638 053	2 344 942	5.8	4.6	9.3
BE	10 712	2 973	7 739	83 942	13 025	70 917	7.8	4.4	9.2
BG	6 251	5 563	688	30 999	24 579	6 420	5.0	4.4	9.3
CZ	24 532	18 074	6 458	112 134	62 801	49 332	4.6	3.5	7.6
DK	10 368	4 944	5 424	62 536	17 029	45 507	6.0	3.4	8.4
DE	214 482	141 515	72 967	1 178 117	519 707	658 410	5.5	3.7	9.0
EE	1 241	709	531	6 737	2 345	4 392	5.4	3.3	8.3
IE	11 839	5 770	6 069	65 759	17 515	48 243	5.6	3.0	7.9
EL	13 561	12 296	1 265	106 010	93 557	12 453	7.8	7.6	9.8
ES	119 969	112 104	7 865	580 175	505 438	74 737	4.8	4.5	9.5
FR	212 562	192 834	19 728	1 348 554	1 155 999	192 555	6.3	6.0	9.8
IT	80 183	66 023	14 160	515 385	390 829	124 556	6.4	5.9	8.8
CY	1 704	913	791	11 936	2 490	9 446	7.0	2.7	11.9
LV	4 262	3 334	928	14 786	7 718	7 068	3.5	2.3	7.6
LT	3 813	2 418	1 395	16 714	7 199	9 515	4.4	3.0	6.8
LU	1 199	9	1 190	8 662	50	8 612	7.2	5.7	7.2
HU	22 155	17 801	4 353	85 371	54 110	31 261	3.9	3.0	7.2
MT	140	:	140	968	:	968			6.9
NL	29 563	13 822	15 740	228 655	71 528	157 127	7.7	5.2	10.0
AT	15 426	7 958	7 468	86 608	32 399	54 210	5.6	4.1	7.3
PL	36 245	30 808	5 437	213 719	151 246	62 473	5.9	4.9	11.5
PT	10 265	9 244	1 021	52 327	41 725	10 602			
RO	10 275	9 429	845	54 766	43 760	11 006	5.3	4.6	13.0
SI	3 733	1 796	1 937	17 310	5 447	11 862	4.6	3.0	6.1
SK	6 724	3 895	2 829	43 175	20 543	22 632	6.4	5.3	8.0
FI	30 115	25 517	4 597	95 674	69 059	26 616	3.2	2.7	5.8
SE	38 399	29 713	8 687	157 754	92 219	65 535			
UK	119 176	66 728	52 448	804 224	235 736	568 488	6.7	3.5	10.8
HR	6 721	4 831	1 890	34 346	24 200	10 145	5.1	5.0	5.4
NO	16 800	10 900	5 900	87 740	42 610	45 130	5.2	3.9	7.6

Source: Eurostat, *Tourism Statistics*.

Notes: (1) EU-27 for number of holiday trips and number of nights spent: excluding domestic trips for MT; (2) EU-27 for average length of holiday trips: excluding MT (incomplete or unreliable data); (3) Data for DK, IT, MT and UK: 2007; (4) Data for PT and SE: 2006; (5) MT: data refers to estimates for outbound trips only (no information on domestic tourism available).

Table 6: Holiday trips of EU residents (aged 15 and over), 2008, by length of stay (*share and cumulative share of the total number of holiday trips with overnight stays*)

	Share in the total number of holiday trips (percentage)						Cumulative share in the total number of holiday trips (cumulative percentage)					
	1-3 nights	4-7 nights	8-14 nights	15-28 nights	29-91 nights	92-365 nights	1-3 nights	4-7 nights	8-14 nights	15-28 nights	29-91 nights	92-365 nights
EU-27	53	27	13	5	2	<1	53	80	93	98	>99	100
BE	31	33	21	11	3	<1	31	65	86	97	>99	100
BG	60	24	13	2	<1	<1	60	84	97	99	>99	100
CZ	60	26	11	3	<1	<1	60	86	97	>99	>99	100
DK	42	37	15	4	1	<1	42	80	94	99	>99	100
DE	52	28	15	5	<1	<1	52	80	95	>99	>99	100
EE	66	20	10	3	2	<1	66	86	95	98	>99	100
IE	51	32	13	4	1	<1	51	83	95	99	>99	100
EL	41	31	13	9	5	<1	41	72	85	95	>99	100
ES	67	19	7	4	2	<1	67	87	94	97	>99	100
FR	52	24	15	7	2	<1	52	76	91	98	>99	100
IT	50	28	14	6	3	<1	50	77	91	97	>99	100
CY	48	27	13	8	4	<1	48	74	88	96	>99	100
LV	78	14	6	1	1	<1	78	92	97	99	>99	100
LT	63	22	12	2	<1	<1	63	85	97	>99	>99	100
LU	37	35	19	7	2	<1	37	72	91	98	>99	100
HU	68	24	7	1	<1	<1	68	91	98	>99	>99	100
MT	:	:	:	:	:	:	:	:	:	:	:	:
NL	35	32	19	12	2	<1	35	67	86	98	>99	100
AT	44	38	13	4	<1	<1	44	82	95	>99	>99	100
PL	53	27	15	3	2	<1	53	80	95	98	>99	100
PT	63	19	11	6	2	<1	63	81	92	98	>99	100
RO	47	:	:	:	:	:	47	:	:	:	:	:
SI	58	27	13	2	<1	<1	58	85	98	>99	>99	100
SK	31	42	23	4	<1	<1	31	73	96	>99	>99	100
FI	77	18	4	<1	<1	<1	77	95	99	>99	>99	100
SE	67	:	:	:	:	:	67	:	:	:	:	:
UK	40	37	15	6	2	<1	40	76	92	98	>99	100
HR	:	:	:	:	:	:	:	:	:	:	:	:
NO	:	:	:	:	:	:	:	:	:	:	:	:

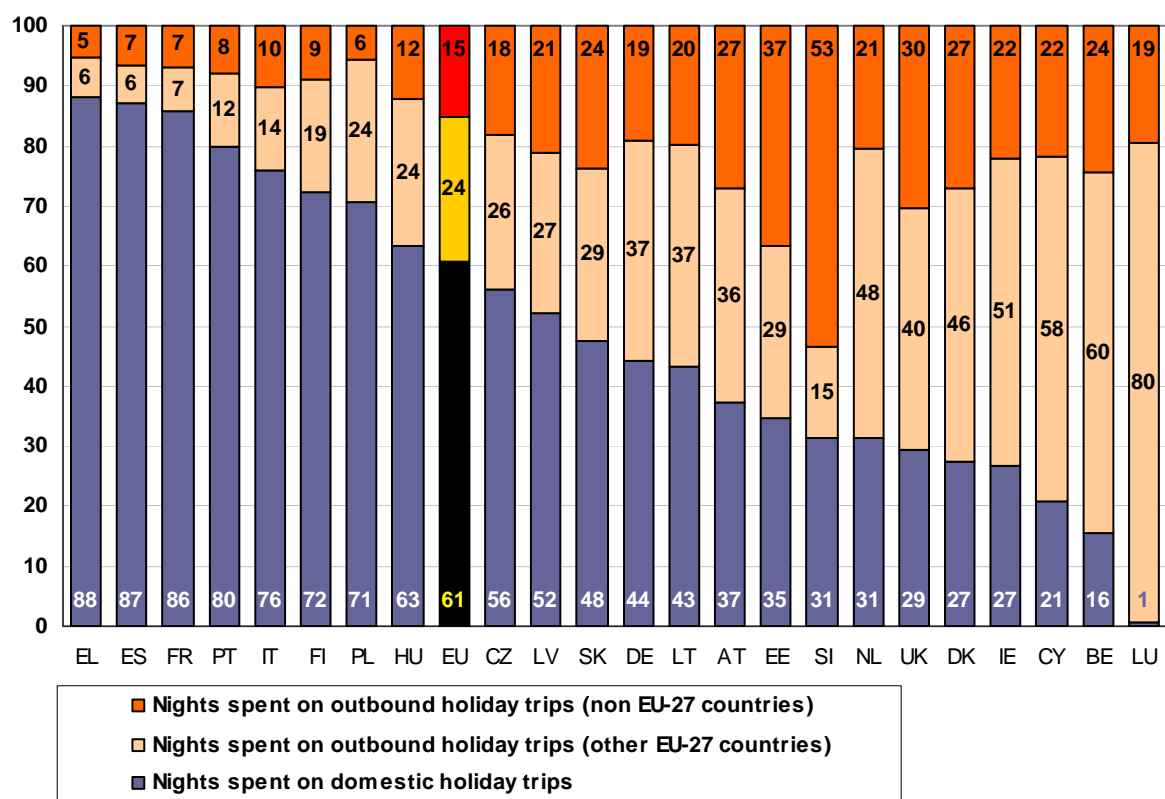
Source: Eurostat, *Tourism Statistics*.

Notes: (1) EU-27 excluding MT, distribution of long trips by length of trip includes estimates for RO and SE; (2) EU-27 for breakdown of long trips: excluding MT, RO; (3) Data for DK, IT and UK: 2007; (4) Data for PT and SE: 2006.

IV.4 The European Union is an attractive destination for its citizens

Table 3 and Graph 6 showed that only slightly more than 6% of the holiday trips made by EU residents had a destination outside the European Union. Given that destinations outside the EU will in most cases be relatively far away from the place of residence and that tourists visiting these destinations may opt for trips of a relatively longer duration, it is not surprising that the importance of non-EU destinations in the total number of nights was somewhat higher, namely 15% of all nights spent on holiday trips by EU residents (see Graph 8). In other words, EU residents spent 85% of their nights on holiday trips in 2008 within the borders of the European Union, with the domestic markets – once again – occupying a dominant position (accounting for 61% of all nights spent by EU residents). Only Slovenian residents spent more than half of their holiday nights outside the EU – most probably because of the proximity of Croatia.

Graph 8: Nights spent by EU residents (aged 15 and over) on holiday trips, 2008, by destination (shares)



Source: Eurostat, *Tourism Statistics*.

Notes: (1) EU-27: excluding BG, MT, RO and SE (incomplete or unreliable data); (2) EU-27 includes 2007 data for DK, IT, UK; (3) DK, IT, UK: 2007 data.

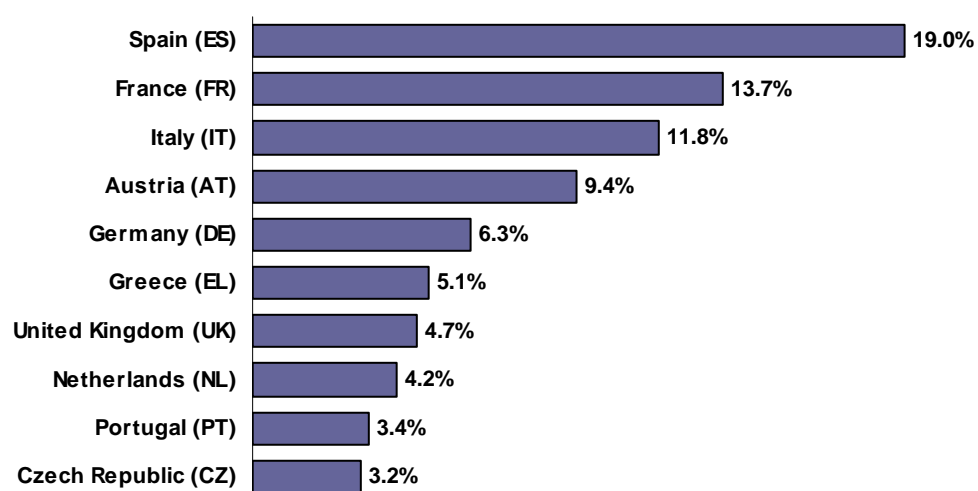
For a large number of Europeans, their own country of residence appeared to be the most attractive destination. Most nights spent on holiday trips were spent on the domestic territory by Greeks (88%), Spaniards (87%), French (86%), Portuguese (80%) and Italians (76%). It is obvious that the location (southern) and the size of the countries had a significant impact. Not surprisingly, these five Member States also rank among the top-10 destinations for other EU residents (see also further, Graph 9).

The same factors (location and size) probably had an impact at the other end of the spectrum too. Less than 30% of all holiday nights were spent in their own country by residents of Luxembourg (1%), Belgium (16%), Cyprus (21%), Ireland (27%) and Denmark (27%).

IV.5 Spain is the most popular foreign destination for residents of the European Union

Although domestic tourism proved to be a very popular option for Europeans, it is interesting to look at the popularity of foreign destinations. On the basis of the responses to the tourism demand surveys in all Member States (including questions on the country of destination of the trips), the number of outbound trips can be calculated by country of destination. Graph 9 ranks the top-10 Member States in terms of the number of outbound trips made to these countries by residents of other EU Member States (therefore, the bars in Graph 9 can be interpreted as inbound trips by tourists from other Member States).

Graph 9: Top-10 destinations within the EU for holiday trips made by EU residents (inbound trips only, excluding domestic trips), 2008



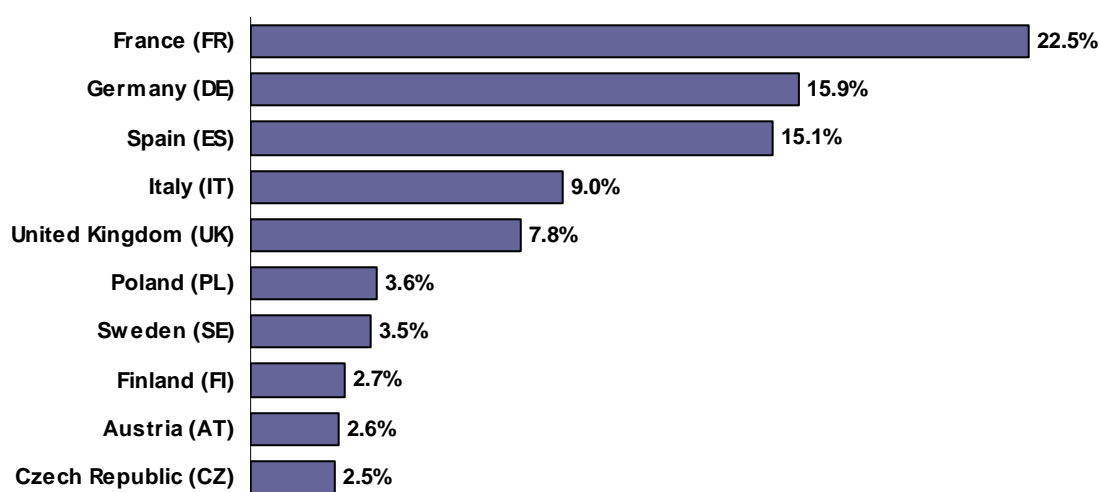
Source: Eurostat, *Tourism Statistics*.

Notes: (1) Based on partner data collected by the other 26 Member States, data collected by DK, MT and UK refers to 2007; (2) Percentages refer to the share of the country in all trips abroad with a destination in another EU Member State made by EU residents.

In 2008, Spain was by far the most popular destination for Europeans within the European Union. For nearly one out of every five outbound holiday trips, residents from the other 26 Member States picked Spain as the destination. Taken together with other traditional tourism countries, such as France (13.7%), Italy (11.8%) and Austria (9.4%), Spain accounted for more than half of all outbound trips made by EU residents within the EU (53.9%). The 10 Member States listed in Graph 9 represented more than 80% of all international tourism flows inside the European Union.

When taking *all* holiday trips inside the EU into consideration, regardless of whether the destination was within the own Member State or in another country of the EU, France ranked first in the list of the most popular destinations, thanks to the high share of domestic tourism in that country (see also Table 5). Considering domestic trips and trips abroad, the top-3 countries - namely France (22.5%), Germany (15.9%) and Spain (15.1%) – accounted for more than 50% of all trips made by EU residents.

Graph 10: Top-10 destinations within the EU for holiday trips made by EU residents
(total internal tourism, i.e. inbound plus domestic trips), 2008



Source: Eurostat, *Tourism Statistics*.

Notes: (1) Based on partner data collected by the other 26 Member States, data collected by DK, MT and UK refers to 2007; (2) Data on domestic trips for PT and SE refers to 2006, data on domestic trips missing for MT (not shown on the graph, but indirectly included via the shares); (3) Percentages refer to the share of the country in all trips with a destination in the EU (domestic or foreign) made by EU residents.

IV.6 Daily tourist expenditure of European tourists is on average 69 euro

The previous paragraphs focused on the *tourist flows* in the European Union. Turning to the expenditure of these tourists, information on monetary flows can complement the analysis. While Table 7 gives only a fragmented picture of tourist expenditure by EU residents for holiday trips (at the time of writing, expenditure data were available for only 14 of the 27 Member States), it is possible nevertheless to draw some conclusions from the data.

With an average tourist expenditure *per trip* of 291 euro and 802 euro for domestic trips and outbound trips respectively, the average spend was 2.75 times higher for outbound trips as compared to trips within the own country. The primary explanatory factor was most probably the difference in the average length of stay. Indeed, Table 5 showed that, for the EU-27, outbound trips were on average twice as long compared to domestic trips (9.3 nights versus 4.6 nights; for the subset of 14 Member States analysed in Table 7, the average length of outbound and domestic trips was 9.0 and 4.9 nights respectively). Other factors could be easier access to relatively cheaper accommodation options on the domestic market and the savings on transport costs to reach domestic destinations (e.g. by private car instead of by air).

By looking at the expenditure *per night* – which is a proxy of the daily spending - the effect of the duration of the trip can to a large extent be filtered out. Residents of the 14 countries for which data were available spent on average 89 euro per overnight stay during their outbound trips in 2008, which was about 1.51 times higher than the average expenditure per overnight stay on domestic trips (59 euro).

Throughout the European Union, the average spending per trip was 401 euro, ranging from 192 euro for Spanish tourists to 1 824 euro in the case of Luxembourg. Obviously, the differences were driven by the relative importance of domestic and outbound tourism. The countries with the lowest and highest values for average expenditure per trip were the same as the countries where outbound tourism had the lowest and highest importance respectively. Table 5 showed that outbound trips – for which spending was on average higher - accounted for less than 7% of all trips made by Spanish residents; for residents of Luxembourg, outbound trips represented more than 99% of the total number of holiday trips with overnight stays. The fact that spending on outbound trips was the highest in Luxembourg (1 834 euro) and spending on domestic trips was relatively low in Spain (144 euro), made the impact even stronger.

Table 7: Tourist expenditure on holiday trips of EU residents (aged 15 and over), 2008, by destination

	Tourist expenditure on holiday trips with overnight stays (in million euro)			Tourist expenditure per trip (in euro)			Tourist expenditure per night spent (in euro)		
	All holiday trips	Domestic holiday trips	Outbound holiday trips	All holiday trips	Dom. holiday trips	Outb. holiday trips	All holiday trips	Dom. holiday trips	Outb. holiday trips
EU-27	:	:	:	401	291	802	69	59	89
BE	6 273	563	5 710	586	189	738	75	43	81
BG	:	:	:	:	:	:	:	:	:
CZ	:	:	:	:	:	:	:	:	:
DK	:	:	:	:	:	:	:	:	:
DE	81 765	28 245	53 520	381	200	733	69	54	81
EE	:	:	:	:	:	:	:	:	:
IE	6 504	1 083	5 421	549	188	893	99	62	112
EL	5 011	3 868	1 142	369	315	903	47	41	92
ES	22 987	16 169	6 817	192	144	867	40	32	91
FR	114 655	93 741	20 914	539	486	1 060	85	81	109
IT	29 686	18 536	11 150	370	281	787	58	47	90
CY	1 327	328	999	779	359	1 262	111	132	106
LV	:	:	:	:	:	:	:	:	:
LT	:	:	:	:	:	:	:	:	:
LU	2 186	4	2 183	1 824	437	1 834	252	76	253
HU	:	:	:	:	:	:	:	:	:
MT	:	:	:	:	:	:	:	:	:
NL	13 577	2 226	11 351	459	161	721	59	31	72
AT	9 064	2 731	6 333	588	343	848	105	84	117
PL	:	:	:	:	:	:	:	:	:
PT	2 175	1 271	904	212	137	885	42	30	85
RO	:	:	:	:	:	:	:	:	:
SI	760	170	589	203	95	304	44	31	50
SK	:	:	:	:	:	:	:	:	:
FI	7 095	3 721	3 374	236	146	734	74	54	127
SE	:	:	:	:	:	:	:	:	:
UK	:	:	:	:	:	:	:	:	:
HR	:	:	:	:	:	:	:	:	:
NO	:	:	:	:	:	:	:	:	:

Source: Eurostat, Tourism Statistics.

Notes: (1) EU-27: aggregate data based on data from the 14 Member States for which data is available (BE, DE, IE, EL, ES, FR, IT (2007 data), CY, LU, NL, AT, PT, SI, FI). Trips made by residents of these 14 Member States represent only 72.7% of the total number of holiday trips, therefore the figures are not necessarily representative for the EU-27.

Also when looking at the expenditure per overnight stay, Luxembourg was clearly an outlier, with a value of 252 euro - compared to an average of 71 euro for the entire set of 14 countries – followed by Cyprus (111 euro per night) and Austria (105 euro per night).

For domestic trips in particular, the average expenditure differed significantly across Europe. Spanish, Dutch, Portuguese and Slovenian tourists spent around 30 euro per night on domestic trips with overnight stays, while French and Austrian tourists spent over 80 euro per night while on holiday in their own country.

Average expenditure on outbound trips was more centered around the European average of 89 euro per night, with values ranging from around 80 euro for residents of the Netherlands (72 euro), Belgium (81 euro), Germany (81 euro) and Portugal (85 euro) to around 120 euro for Irish (112 euro), Austrian (117 euro) and Finnish tourists (127 euro). In the latter segment, a very high value was observed for Luxembourg (253 euro), while at the bottom end of the spectrum an average spend of 50 euro per night on outbound trips was recorded for Slovenian tourists – again, the proximity of Croatia (accounting for the majority of all Slovenian outbound trips) probably played a role.

IV.7 Nearly half of the long holiday trips take place between July and September

Tourism is traditionally an activity which has a strong seasonal component. On the one hand, the choice of the time to go on holidays depends on school timetables or work schedules, which determine peaks in annual leave. On the other hand, the seasonal differences in the climate at the destinations may have a decisive influence on when to go on holidays.

Graph 11 shows the distribution of the holiday trips over the four quarters of the year, broken down by destination and by length of trip. The first three graphs (first row) show that in 2008 more than one third of all holiday trips (34%) were made in the third quarter, i.e. between July and September. The seasonal pattern was slightly more pronounced for outbound trips, with 36% of the trips taking place during the peak quarter.

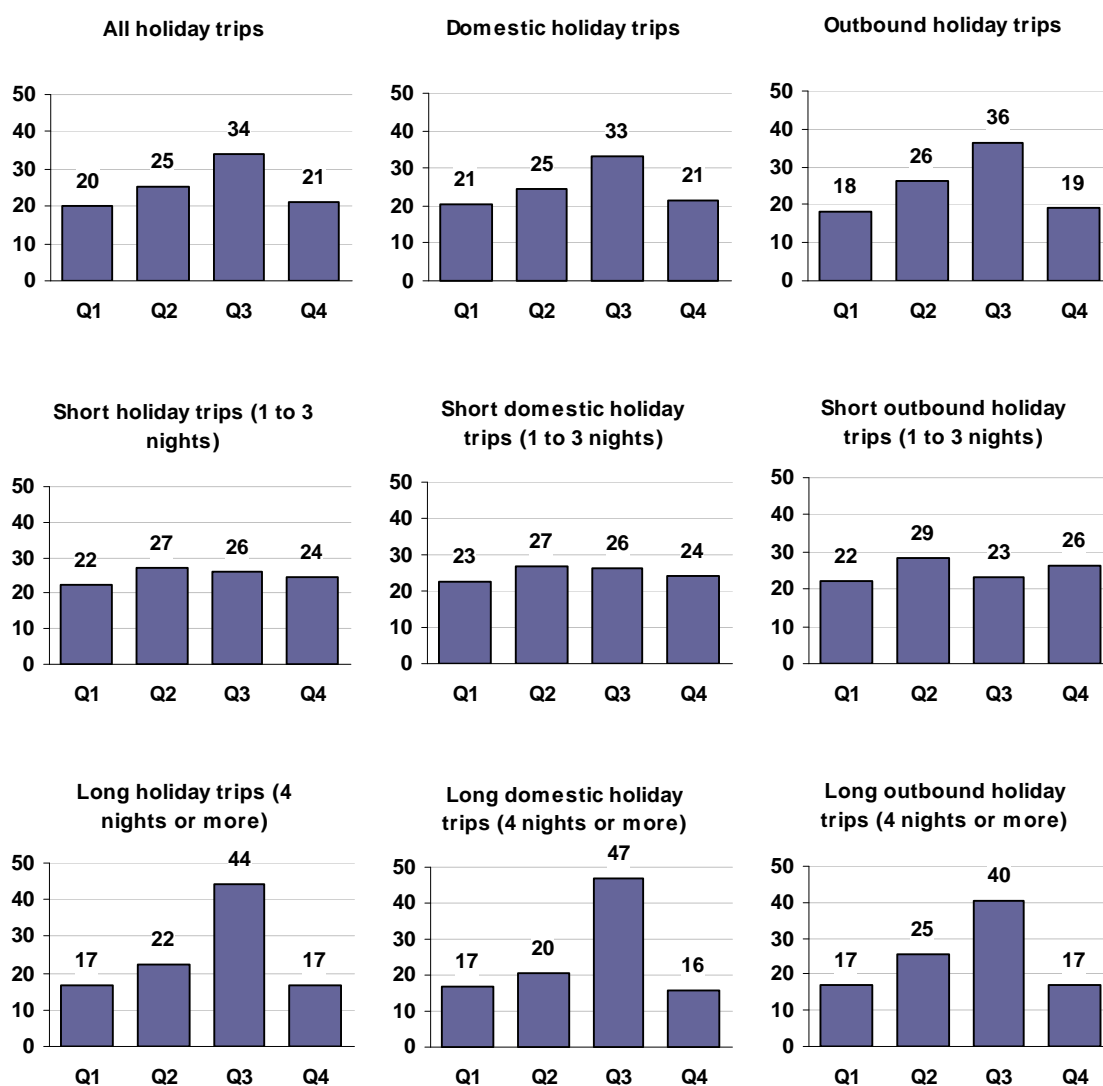
The length of the trips seemed to have the biggest influence on the seasonality.

In 2008, EU residents spread their short holiday trips of not more than 3 overnight stays more or less evenly throughout the year. For short trips, the pre-season during the second quarter (27%) was actually slightly more popular than the summer period (26%). Again, no noticeable differences could be observed when differentiating by destination. Surprisingly, the summer months tended to be relatively unimportant for short outbound holiday trips. On the one hand, tourists choosing a destination abroad during summer may have opted to stay longer. On the other hand, the spring climate and (in many countries) long weekends during the second quarter may have been an incentive to take a short break (e.g. city trip) in a foreign country.

The most important seasonality was observed for long holiday trips, with EU residents taking 44% of their long trips in the third quarter of 2008. The peak is most pronounced for domestic holiday trips of 4 nights or more, with nearly half (47%) of those trips being made between July and September.

The above findings showed that the increasing popularity of short holiday trips (see also Table 4) can contribute to smoothing the seasonal pattern of tourism. A decrease in the seasonality in tourism can contribute to lower (or at least more equally distributed) pressure at the destination as a result of the presence of tourists, but it can also create more stable job opportunities for persons employed in the tourism sector.

Graph 11: Seasonality of tourism : share of holiday trips of EU residents (aged 15 and over) by quarter, EU-27, 2008, by destination and by duration (*shares*)



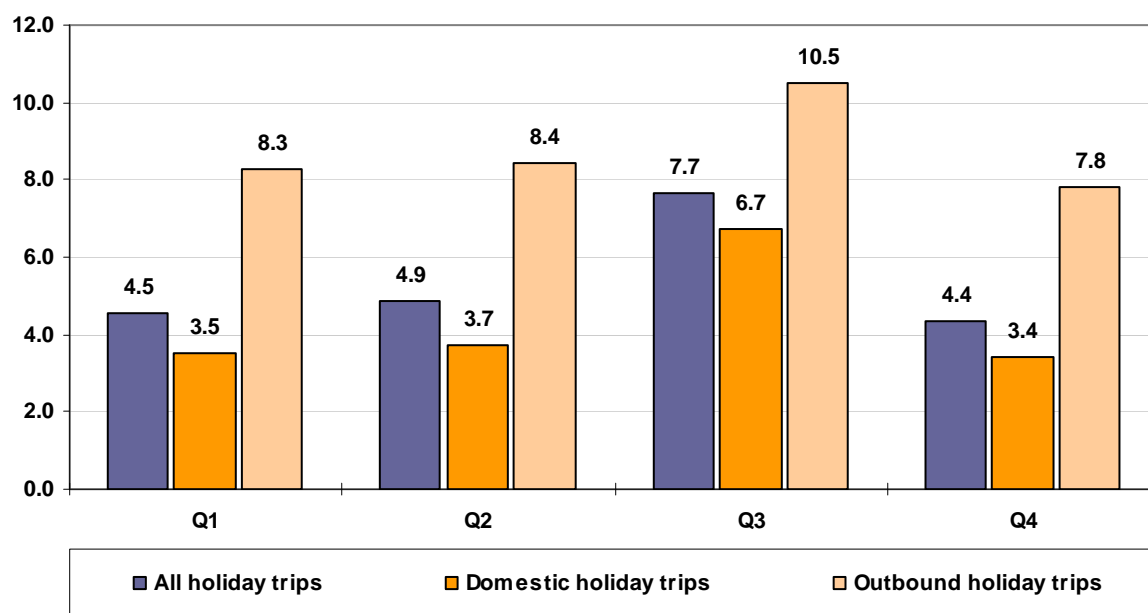
Source: Eurostat, *Tourism Statistics*.

Notes: (1) Share of the number of holiday trips for the quarter in the total number of holiday trips of the specified destination and duration during the entire reference year ; (2) EU-27 excluding MT (incomplete or unreliable data) ; (3) EU-27 including 2007 data for DK and 2006 data for PT, SE and UK.

Graph 12 also reflects the relative importance of long holiday trips in the third quarter (see Graph 11). On average, the duration of holiday trips made during this quarter exceeded the length of trips made during the first, second or fourth quarter by 3 nights (7.7 versus 4.5, 4.9 and 4.4 nights respectively).

A similar pattern was observed for both domestic and outbound holiday trips. In the peak season, EU residents went on domestic holiday trips for an average of one week (6.7 nights), while in the other three quarters of the year domestic trips lasted half a week on average. Outbound holiday trips had a duration of about one and half weeks (10.5 nights) during the summer season, compared to around 8 nights in the off-peak quarters.

Graph 12: Seasonality of tourism : average length of holiday trips of EU residents (aged 15 and over) by quarter, EU-27, 2008, by destination (domestic versus outbound)



Source: Eurostat, *Tourism Statistics*.

Notes: (1) Average length is calculated by dividing the number of nights spent by the number of trips ; (2) EU-27 excluding MT (incomplete or unreliable data) ; (3) EU-27 including 2007 data for DK and 2006 data for PT, SE and UK.

IV.8 For one in four long holiday trips people travel to their destination by air

Table 8 gives some insight into the relative share of the different transport modes used by Europeans as the principal means of transport for their holiday trips of 4 nights or more.

Motorised vehicles (private or rented) were the main means of transport on 56% of the long holiday trips. This dominant position was observed in most of the countries. Only in Denmark, Estonia, Latvia and the island Member States - Ireland and the United Kingdom (no data available for Malta and Cyprus) - was air transport the leading means of transport for long trips. In all other Member States, private and hired vehicles had a market share of more than 50% as the main mode of transport for long trips (except Slovakia, where the share was 47%).

Among the Member States for which data are available, the share of air transport exceeded 50% only for long trips made by Irish or British tourists. On average, EU residents used the plane to reach the destination of their long holiday trips in 26% of cases. In the EU, the lowest use of air transport was recorded in Bulgaria (6%) and Poland (9%). In both cases, tourists seemed to have preferred transport by bus or coach instead, with shares of 25% and 14% respectively.

European tourists reached their holiday destination by train in only 9% of cases. The high share of domestic tourism in combination with the extended network of long distance high speed trains, made railway transport the second most important mode of transport for French tourists (13%), behind motorised vehicles (73%) but ahead of air transport (11%). The highest share of trains as the main mode of transport for long holiday trips was recorded in Poland (18%). Irish, Greek, Portuguese and Slovenian tourists chose the train for only 2% of their long holiday trips.

The importance of transport by bus or coach was relatively limited in 2008, being used on only 6% of long holiday trips. Nevertheless, Table 8 shows that for Bulgarian and Slovak tourists around 1 in 4 long holiday trips had bus or coach as their main mode of transport (25% and 23% respectively).

In nearly all Member States, the relevance of sea transport for long holiday trips was relatively limited, with an average figure of 3%. The only exception is Greece, where residents travelled to their holiday destination by boat on nearly 1 out of 5 trips (18%). The big domestic market, including many popular island destinations, undoubtedly played an important role in this.

Table 8: Main means of transport: holiday trips of 4 nights or more made by EU residents (aged 15 and over), 2008, by main means of transport (*shares*)

	Air	Sea	Land	<i>of which (in percentage points):</i>			
				Railway	Bus, coach	Private and hired vehicles	Other
EU-27	26	3	71	9	6	56	<1
BE	33	<1	66	5	7	53	<1
BG	6	:	94	6	25	62	<1
CZ	16	<1	84	8	18	57	<1
DK	45	2	54	5	6	42	<1
DE	27	2	72	10	7	55	<1
EE	41	7	52	:	17	28	7
IE	73	3	24	2	2	20	<1
EL	12	18	70	2	11	57	<1
ES	18	2	80	7	15	58	<1
FR	11	<1	88	13	2	73	<1
IT	20	6	74	7	5	61	<1
CY	:	:	:	:	:	:	:
LV	48	<1	51	12	18	21	<1
LT	32	1	66	3	15	48	<1
LU	39	<1	60	5	4	51	<1
HU	12	<1	88	8	7	72	<1
MT	:	:	:	:	:	:	:
NL	28	1	71	4	5	63	<1
AT	29	<1	70	7	7	55	1
PL	9		91	18	14	58	1
PT	18	1	80	2	8	69	1
RO	:	:	:	:	:	:	:
SI	11	1	88	2	6	79	<1
SK	21	<1	79	9	23	47	<1
FI	27	5	68	8	5	54	<1
SE	:	:	:	:	:	:	:
UK	54	7	39	5	3	30	<1
HR	7	2	91	5	18	66	<1
NO	:	:	:	:	:	:	:

Source: Eurostat, Tourism Statistics.

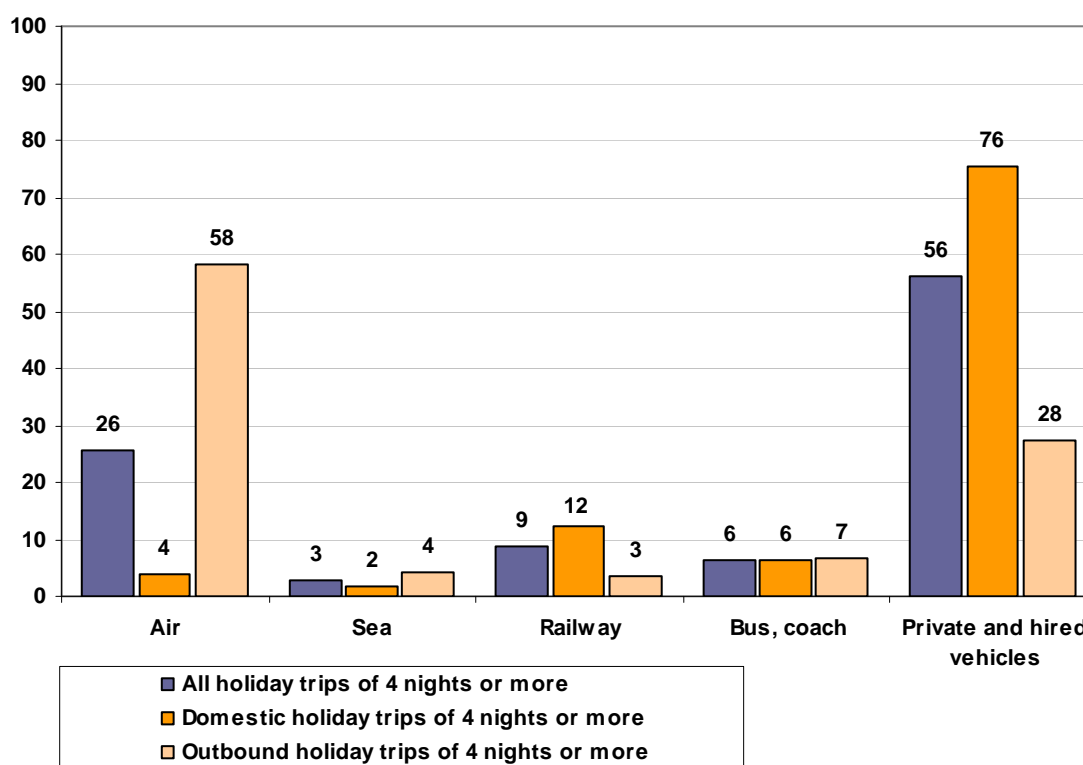
Notes: (1) EU-27 excluding CY, MT and SE (incomplete or unreliable data); (2) Data for DK, IT and UK: 2007.

It is not surprising that preferences differed in terms of the means of transport chosen to reach the holiday destination for domestic and outbound trips.

Graph 13 shows that, on domestic trips, private and hired vehicles were by far the dominant means of transport (76%), followed by rail (12%) and bus or coach (6%). The relative share of air transport of domestic trips was only 4%, the largest share being recorded in Spain, where 1 in 10 domestic trips were made by air (it should be recalled that for Spanish tourists the Canary Islands and Balearic Islands are domestic destinations).

Air transport dominated the segment of outbound holiday trips of 4 nights or more (with 58%). The share of air transport for outbound trips was more than double the share for private and hired vehicles (28%). The other modes of transport used by EU residents for their long trips abroad were relatively insignificant, with shares of 7% or less.

Graph 13: Main means of transport: holiday trips of 4 nights or more made by EU residents (aged 15 and over), EU-27, 2008, by destination and by main means of transport (in %)



Source: Eurostat, *Tourism Statistics*.

Notes: (1) EU-27 excluding CY, MT and SE (incomplete or unreliable data) ; (2) EU-27 including 2007 data for DK, IT and UK ; (3) Category 'Other land transport' not shown on the graph (represents less than 1%).

IV.9 Holiday trips are often spent at non-rented accommodation facilities

To finish off the chapter on tourism trips and their characteristics, we will take a closer look at the types of accommodation which EU residents choose for their holiday trips of 4 nights or more.

The more formal market of so-called collective accommodation establishments accounted for 45% of the holiday trips of 4 nights or more. Hotels and similar establishments accounted for 30%, while both tourist campsites and holiday dwellings were the accommodation of choice on 6% of the long holiday trips.

With a share of 32%, accommodation provided free of charge by friends or relatives (labelled as 'other types of private accommodation' in the classification) appeared to be the most popular accommodation option for EU residents for their long holiday trips in 2008. Secondary residences (owned dwellings) accounted for 9%.

While tourists spending their holidays in these types of accommodation spend little or nothing on accommodation, their contribution to the tourism economy is not to be neglected. These tourists also need to be transported to their destination and, at this destination, they make use of local shops, purchase food or beverage services from local entrepreneurs or visit tourist attractions in the area.

Again, a difference was observed for domestic trips as compared to outbound trips. While the dominance of non-rented accommodation was even stronger for domestic trips, hotels and similar establishments were the main means of accommodation for the majority (53%) of the outbound trips made by EU residents.

Table 9: Main means of accommodation: holiday trips of 4 nights or more made by EU residents (aged 15 and over), EU-27, 2008, by destination and by main means of accommodation (*shares*)

	All holiday trips of 4 nights or more	Domestic holiday trips of 4 nights or more	Outbound holiday trips of 4 nights or more
Collective tourism establishments	45	32	69
Hotels and similar establishments	30	18	53
Tourist campsites	6	6	6
Holiday dwellings	6	5	7
Other collective accommodation	2	1	2
Specialised establishments	1	2	1
Private tourism accommodation	55	68	31
Rented accommodation	14	16	10
Secondary residence	9	13	3
Other types of private accommodation	32	39	18

Source: Eurostat, Tourism Statistics.

Notes: (1) EU-27: aggregate data based on 19 MS for which full data is available for 2007 or 2008, plus Croatia.

V. Accommodation statistics

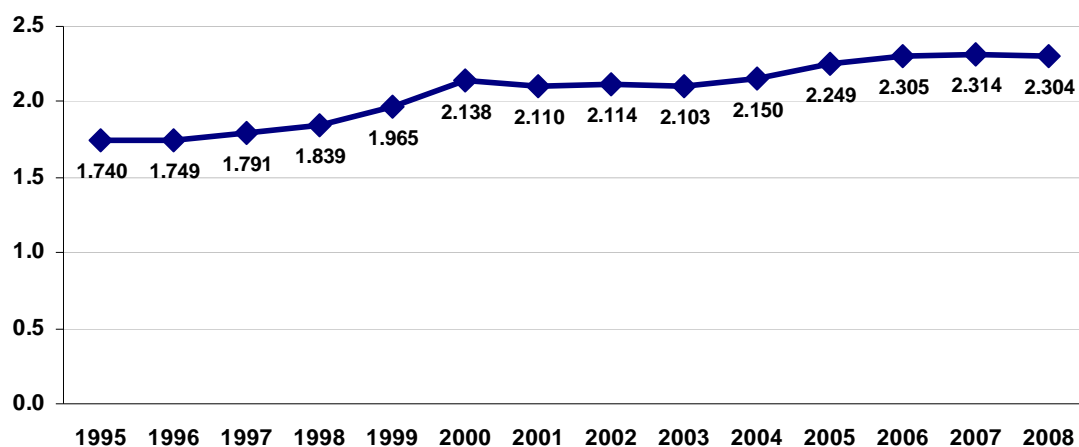
While the previous two chapters discussed data collected from tourists, generally in the context of a households/individuals survey, the current chapter discusses data collected from establishments that are active in the tourist accommodation sector. The analysis focuses on the nights spent by residents and non-residents in so-called collective accommodation. This includes, on the one hand, hotels and similar establishments and, on the other hand, other types of accommodation such as holiday homes or tourist campsites.

V.1 Number of nights spent has risen by 564 million since 1995 to stand at 2.3 billion in 2008

Section IV.2 already mentioned that tourism has seen strong growth during the past decade. This growth is also reflected in Graph 14 which shows the trend of the number of tourism nights spent at collective accommodation establishments in the European Union. Over the period 1995-2008, the number of nights spent (by residents and non-residents) increased by 32% from 1.74 billion nights to over 2.30 billion. This corresponds to an average annual growth rate of 2.2%.

When looking at the trends in Graph 14 and Graph 15, the data clearly show two periods when negative growth rates were observed, in both cases due to factors that were exogenous to the tourism sector. Following strong growth in 1999 and 2000 (+6.9% and +8.8% respectively), the number of nights spent in accommodation establishments throughout the EU decreased in the following years, in the aftermath of the 2001 terrorist attacks in the U.S. It took the accommodation sector a few years to recover, but recently the shock caused by the economic slowdown has resulted in a negative growth rate for the year 2008 (-0.4%).

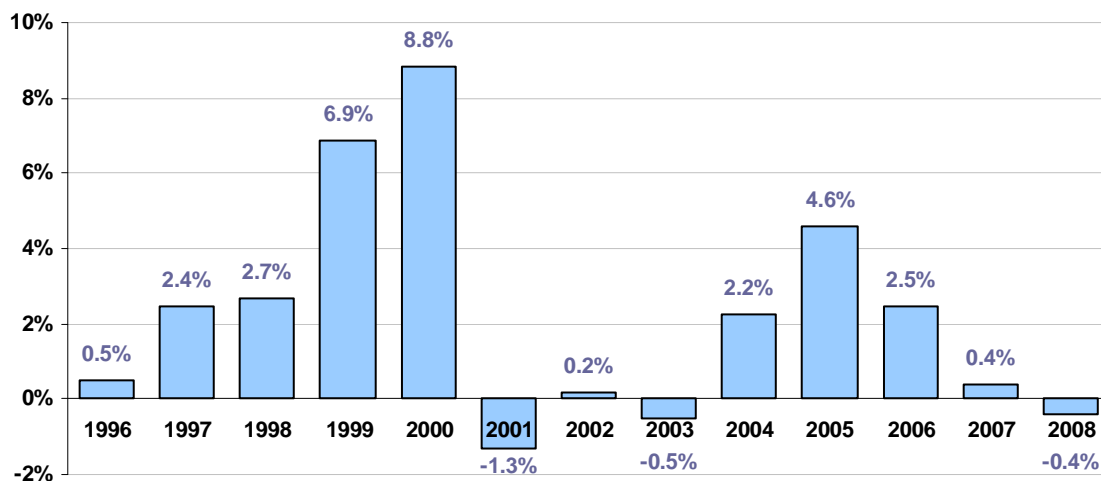
Graph 14: Evolution of the number of tourism nights, EU-27, 1995-2008
(1000 million nights spent in collective tourism accommodation)



Source: Eurostat, *Tourism Statistics*.

Notes: (1) Total of nights spent by residents and nights spent by non-residents.

Graph 15: Evolution of the number of tourism nights, EU-27, 1995-2008
 (% change compared to previous year, nights spent in collective tourist accommodation)




Source: Eurostat, *Tourism Statistics*.

Notes: (1) Total of nights spent by residents and nights spent by non-residents.

V.2 Italy and Spain account for nearly one third of the guest nights spent in the EU

Tourists spent over 2.3 billion nights at collective accommodation establishments in the EU during the year 2008 (see Table 10), with nearly one third of these nights spent in Italy (376 million nights) and Spain (375 million nights). Completing the top five were Germany (with 324 million), France (301 million) and the United Kingdom (252 million). These five Member States accounted for more than 70% of the total guest nights spent at collective accommodation establishments in the EU.

It is obvious that not only the attractiveness of the country played a role in the number of nights spent, but also the size of the country. To filter out the effect of the size of the destination country, it is interesting to look at the tourism intensity - or the number of guest nights spent (by residents and non-residents) as a proportion of the population of the country - which is given in the second column of Table 10 and in Graph 16. These figures can also be used as an indicator for potential tourism pressure in a country, although the indicator should be treated with care because the nights spent at non-rented accommodation are not included. In the European Union, an average of 4.6 guest nights was recorded in relation to the population of 496.5 million inhabitants. The highest tourism intensity was found in the popular island destinations of Malta (19.4) and Cyprus (18.3), followed some way behind by Austria (12.6). Scores of 8.0 or more were recorded for Spain (8.4), but also for relatively smaller countries such as Croatia (8.7), Iceland (8.6) or Ireland (8.1). The lowest ratios could be found in Lithuania and Romania, both with 1.0 guests nights per inhabitant.



As far as the type of accommodation is concerned, hotels and similar establishments represented 68.4% of all guest nights spent at collective accommodation establishments in the EU, with 1.6 billion nights (see Table 10 and Graph 17). Tourist campsites offering pitches for tents, caravans or mobile homes had a share of 15.1%, while holiday dwellings (e.g. clusters of houses or bungalows providing limited hotel services) accounted for 8.6% of the nights spent.

Again, important differences could be seen across the EU. While the share of hotels and similar establishments accounted for over 50% in nearly all Member States, other types of collective accommodation dominated in Denmark, the Netherlands and Poland. In Denmark, tourist campsites represented 43% of all nights spent (data not shown in Table 10). Also in Sweden (35%), Luxembourg (33%), France (33%) and the Netherlands (22%) campsites represented a large share of the accommodation sector in 2008. As regards the position of holiday dwellings, a particularly large share was observed especially in the Netherlands (35%), while Spain (18%) and Belgium (16%) also had large shares.

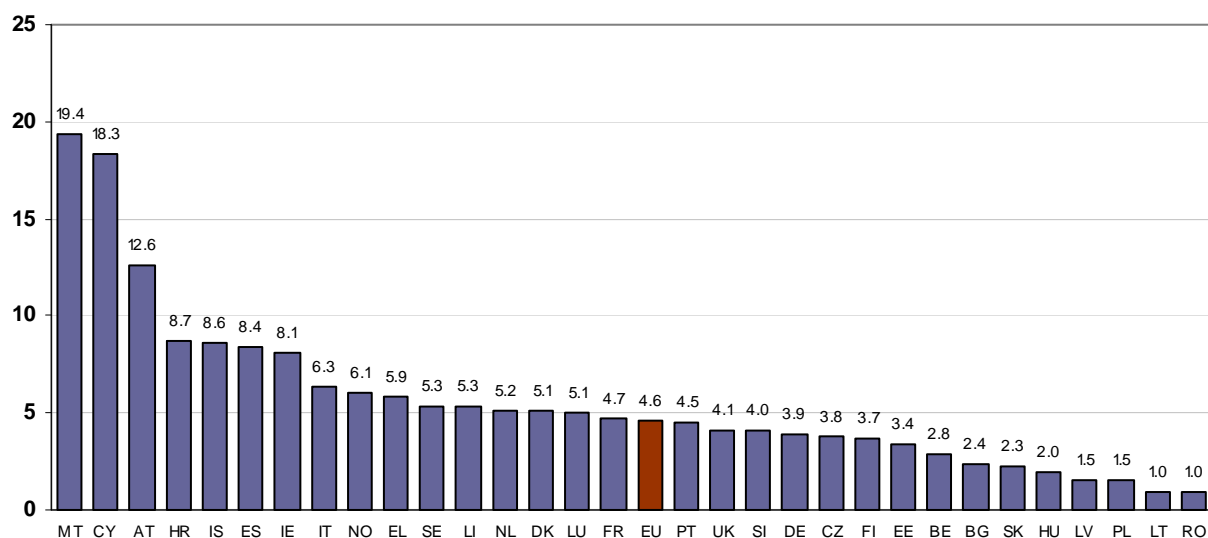
Table 10: Number of tourism nights spent at collective accommodation establishments and tourism intensity, 2008, by type of accommodation (in thousands)

	Total collective accommodation		Hotels and similar establishments		Other collective accommodation	
	Number of nights spent (in thousands)	Tourism intensity (guest nights per inhabitant)	Number of nights spent (in thousands)	Share of total collective accomm.	Number of nights spent (in thousands)	Share of total collective accomm.
EU-27	2 304 168	4.6	1 575 134	68.4	729 034	31.6
BE	29 972	2.8	16 541	55.2	13 431	44.8
BG	18 183	2.4	17 011	93.6	1 172	6.4
CZ	39 283	3.8	27 427	69.8	11 857	30.2
DK	28 027	5.1	10 831	38.6	17 196	61.4
DE	323 876	3.9	218 246	67.4	105 630	32.6
EE	4 602	3.4	3 847	83.6	755	16.4
IE	35 270	8.1	27 844	78.9	7 426	21.1
EL	65 625	5.9	64 074	97.6	1 551	2.4
ES	375 693	8.4	268 430	71.4	107 263	28.6
FR	301 043	4.7	202 280	67.2	98 762	32.8
IT	376 642	6.3	254 329	67.5	122 313	32.5
CY	14 380	18.3	14 310	99.5	71	0.5
LV	3 501	1.5	2 855	81.5	646	18.5
LT	3 249	1.0	2 602	80.1	648	19.9
LU	2 432	5.1	1 375	56.5	1 057	43.5
HU	19 967	2.0	16 150	80.9	3 817	19.1
MT	7 918	19.4	7 751	97.9	167	2.1
NL	84 452	5.2	32 619	38.6	51 834	61.4
AT	104 710	12.6	82 365	78.7	22 345	21.3
PL	56 646	1.5	25 240	44.6	31 406	55.4
PT	47 965	4.5	39 737	82.8	8 228	17.2
RO	20 726	1.0	19 831	95.7	895	4.3
SI	8 171	4.0	5 603	68.6	2 568	31.4
SK	12 259	2.3	7 662	62.5	4 597	37.5
FI	19 466	3.7	16 107	82.7	3 359	17.3
SE	48 605	5.3	25 416	52.3	23 189	47.7
UK	251 506	4.1	164 653	65.5	86 852	34.5
HR	38 532	8.7	20 551	53.3	17 981	46.7
TR	:	:	115 967	:	:	:
CH	:	:	37 334	:	:	:
IS	2 673	8.6	1 946	72.8	727	27.2
LI	187	5.3	134	71.8	53	28.2
NO	28 568	6.1	18 199	63.7	10 369	36.3

Source: Eurostat, Tourism Statistics.

Notes: (1) IT, HU, PT, SE, TR: 2007 data ; (2) IE: includes estimated data for nights spent by residents; (3) Tourism intensity is calculated by dividing the total number of nights spent by residents and by non-residents at collective accommodation establishments by the total population of the country.

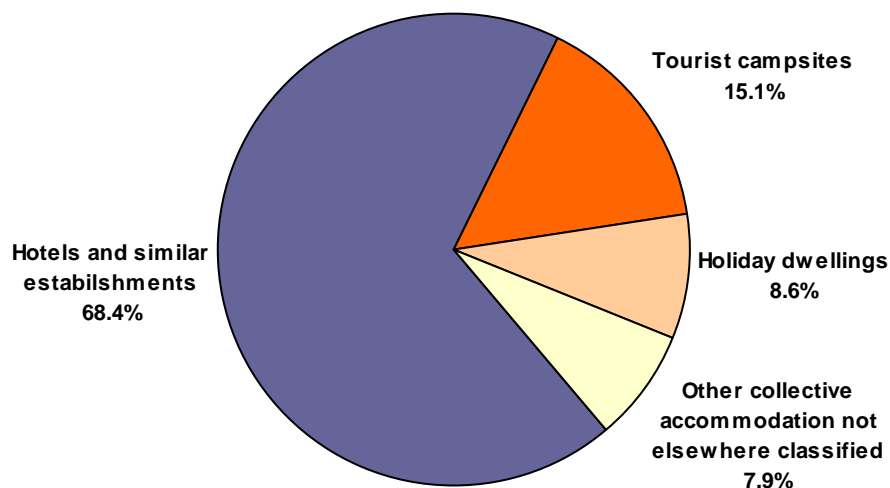
Graph 16: Tourism intensity, guest nights spent at collective accommodation establishments in relation to the population of the country, 2008, ratio



Source: Eurostat, Tourism Statistics.

Notes: (1) 2007 data for IT, HU, PT, SE and estimated data for IE (nights spent by residents); (2) Population: 2007 data.

Graph 17: Tourism nights spent at collective accommodation establishments, EU-27, 2008, shares by type of accommodation



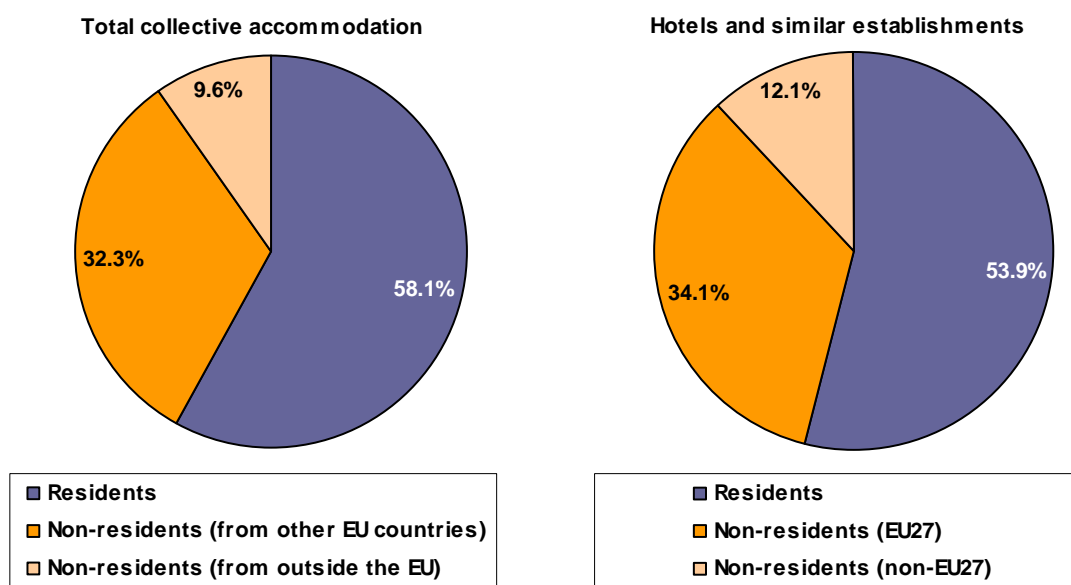
Source: Eurostat, Tourism Statistics.

Notes: (1) EU-27 includes 2007 data for IT, HU, PT, SE and estimated data for IE (nights spent by residents).

V.3 Tourists from outside the EU represent less than ten percent of the guest nights in collective accommodation in the Union

In the previous chapter, we saw that domestic trips have a dominant position in EU tourism. This conclusion is confirmed by the accommodation statistics that show a share of 58.1% of nights spent by residents in the total number of guest nights in collective accommodation (see Graph 18 and Table 11). Tourists coming from other EU Member States accounted for around 32% of the guest nights, while tourists from outside the European Union accounted for less than 10% of the guest nights. When focusing on hotels and similar accommodation only, the dominance of domestic tourism was slightly less pronounced, but still at 53.9%.

Graph 18: Tourism nights spent at collective accommodation establishments, EU-27, 2008, by type of accommodation, shares by origin of the guest



Source: Eurostat, *Tourism Statistics*.

Notes: (1) EU-27 includes 2007 data for IT, HU, PT, SE and estimated data for IE (nights spent by residents).

Table 11 on the next page gives an insight at country level into the number of nights spent at accommodation establishments, broken down by origin of the guests. Romania, Germany and Poland appeared to be attractive destinations primarily for their own inhabitants, with a resident share in the guest nights of 83.8%, 82.6% and 82.0% respectively. In Germany, only 11.0% of the guests nights were spent by residents from other EU Member States - the lowest figure in the EU.

Table 11: Tourism nights spent at collective accommodation establishments, 2008, by type of accommodation, shares by origin of the guest

	Total collective accommodation				Hotels and similar establishments			
	Residents	Non-residents (total)	Non-residents (EU27)	Non-residents (non-EU27)	Residents	Non-residents (total)	Non-residents (EU27)	Non-residents (non-EU27)
EU-27	58.1	41.9	32.3	9.6	53.9	46.1	34.1	12.1
BE	45.4	54.6	46.1	8.5	32.8	67.2	52.8	14.4
BG	35.2	64.8	46.3	18.5	31.6	68.4	49.1	19.4
CZ	49.1	50.9	34.9	15.9	35.3	64.7	43.6	21.1
DK	68.2	31.8	22.3	9.6	58.0	42.0	25.3	16.7
DE	82.6	17.4	11.0	6.4	79.3	20.7	12.3	8.4
EE	36.3	63.7	52.8	10.9	29.1	70.9	58.9	12.0
IE	38.9	61.1	42.6	18.5	31.6	68.4	47.5	21.0
EL	26.9	73.1	58.3	14.8	26.3	73.7	58.7	15.0
ES	40.4	59.6	52.4	7.2	42.1	57.9	49.9	8.0
FR	64.5	35.5	27.4	8.1	64.5	35.5	24.1	11.3
IT	56.6	43.4	31.3	12.1	55.6	44.4	29.7	14.8
CY	8.1	91.9	74.1	17.7	8.1	91.9	74.1	17.8
LV	39.6	60.4	41.4	19.0	33.0	67.0	44.8	22.2
LT	49.9	50.1	35.0	15.1	40.6	59.4	41.4	17.9
LU	7.5	92.5	82.2	10.3	5.7	94.3	77.5	16.8
HU	49.9	50.1	37.6	12.5	47.4	52.6	37.7	14.9
MT	4.2	95.8	84.8	11.0	4.3	95.7	84.9	10.8
NL	70.1	29.9	24.3	5.6	54.1	45.9	32.2	13.6
AT	28.6	71.4	61.9	9.4	26.6	73.4	62.6	10.9
PL	82.0	18.0	13.9	4.1	68.5	31.5	23.5	8.0
PT	40.2	59.8	52.3	7.5	32.6	67.4	58.7	8.7
RO	83.8	16.2	11.4	4.8	83.6	16.4	11.5	4.9
SI	42.4	57.6	42.7	14.8	34.7	65.3	46.5	18.8
SK	58.0	42.0	36.0	5.9	48.1	51.9	43.7	8.2
FI	71.7	28.3	16.1	12.1	70.4	29.6	16.3	13.3
SE	77.0	23.0	12.5	10.6	77.0	23.0	11.8	11.1
UK	68.0	32.0	18.4	13.6	62.6	37.4	21.0	16.4
HR	12.0	88.0	77.6	10.4	14.3	85.7	69.5	16.2
TR	:	:	:	:	36.0	64.0	:	:
CH	:	:	:	:	42.5	57.5	41.5	16.0
IS	29.1	70.9	48.5	22.3	22.1	77.9	51.2	26.7
LI	8.5	91.5	52.3	39.2	2.5	97.5	60.1	37.3
NO	71.6	28.4	23.9	4.6	73.2	26.8	20.5	6.3

Source: Eurostat, Tourism Statistics.

Notes: (1) IT, HU, PT, SE, TR: 2007 data ; (2) IE: includes estimated data for nights spent by residents.

At the other end of the spectrum, it is not surprising that the smaller countries in particular tended to attract high shares of foreign tourists (or relatively few of their own inhabitants). In Cyprus (8.1%), Luxembourg (7.5%) and Malta (4.2%), less than one in ten guests in collective accommodation was on a domestic trip. The share of resident guests was also particularly low in Croatia (12.0%) and Liechtenstein (8.5%).

Within the group of non-resident guests in the accommodation establishments in the different EU countries, 77% on average came from other EU Member States, while 23% of the non-resident guests were tourists coming from the rest of the world, including other European non-EU countries. The number of countries where more than 10% of the guest nights were registered as non-EU visitors is relatively limited and often linked to their geographical location or historical ties with non-EU countries. The highest share was observed for Liechtenstein (39.2%), which can be explained by the proximity to the non-EU country Switzerland, but also because of the small size of the country (and therefore a small domestic market). Iceland, a relatively small country on the border between two continents, ranked second with a 22.3% share of non-EU guests. Within the EU, Member States located near the eastern border of the Union – such as Latvia (19%), Bulgaria (18.5%) and Lithuania (15.1%) - tended to receive relatively large numbers of guests coming from outside the EU. The large waves of immigration that Ireland saw in the past centuries might have contributed to the high share of non-EU guests (18.5%) in Irish collective accommodation establishments.

V.4 The top 20 regions account for more than 35% of all tourism nights spent in the European Union

In paragraph V.2, we saw that two Member States (namely Spain and Italy) accounted for nearly one third of the tourism nights spent at collective accommodation establishments in 2008. A look at the regional level shows the top 3 regions (NUTS2) having attracted nearly one in ten (9.4%) of all guest nights in the EU during 2008. These regions were the Canary Islands (85 million nights spent), the region around Paris, Ile de France (68 million) and Catalonia (63 million). Table 13 shows that the top 10 is dominated by Spanish, Italian and French regions. Together with Tirol in Austria, these regions have a share of more than 25% of the total nights spent in accommodation establishments across the EU.

The four highest ranking Spanish regions together (Canary Islands, Catalonia, Balearic Islands and Andalusia) recorded more than one in nine of the guest nights in the EU (263 million nights or 11.4%).

When considering the resident and non-resident nights separately, the picture does not change significantly. For resident nights, the top three in 2008 were Ile de France (30 million nights), Emilia-Romagna (29 million) and Andalusia (28 million). For non-resident nights, three Spanish regions came top of the list, namely Canary Islands (70 million nights), Balearic Islands (53 million) and Catalonia (39 million).

Table 12: Top 20 tourism destinations (NUTS2 regions), nights spent in collective accommodation (residents and non-residents), 2008

	Total	Residents	Non-residents
1 Canarias (ES)	85 015 200	15 219 100	69 796 100
2 Île de France (FR)	67 528 500	30 232 000	37 296 500
3 Cataluña (ES)	63 199 900	23 874 100	39 325 900
4 Veneto (IT)	61 529 600	25 414 700	36 114 900
5 Illes Balears (ES)	60 637 800	7 736 900	52 900 900
6 Andalucía (ES)	54 278 000	28 624 300	25 653 600
7 Toscana (IT)	41 695 800	21 733 000	19 962 800
8 Emilia-Romagna (IT)	38 174 500	29 180 300	8 994 200
9 Comunidad Valenciana (ES)	38 105 300	20 755 600	17 349 700
10 Provence-Alpes-Côte d'Azur (FR)	35 155 000	21 017 300	14 137 600
11 Tirol (AT)	34 118 000	3 050 900	31 067 100
12 Lazio (IT)	32 107 600	10 840 200	21 267 400
13 Lombardia (IT)	28 648 500	13 868 100	14 780 400
14 Oberbayern (DE)	28 582 900	21 133 400	7 449 400
15 Provincia Autonoma Bolzano/Bozen (IT)	27 293 300	10 112 400	17 180 900
16 Rhône-Alpes (FR)	25 720 700	17 813 800	7 906 800
17 Languedoc-Roussillon (FR)	24 624 600	17 450 900	7 173 800
18 Mecklenburg-Vorpommern (DE)	24 359 600	23 522 600	837 000
19 Aquitaine (FR)	21 239 300	15 674 200	5 565 000
20 Schleswig-Holstein (DE)	20 499 600	19 155 300	1 344 300

Source: Eurostat, *Tourism Statistics*.

Notes: (1) Ranking based on the total number of nights spent (residents plus non-residents) ; (2) Italian regions: 2007 data.

V.5 The summer months of July and August account for nearly one in three nights spent in collective accommodation throughout the year


The supply side data confirm the strong seasonal pattern discussed in section IV.7. Some 32% of all nights spent at collective accommodation establishments in 2008 were registered during July and August. The low season months of January and November each accounted for only 5% of the annual total.

Table 13: Seasonality in tourism: share of tourism nights spent in collective accommodation during the busiest and the lowest months, 2008

	Share of the tourism nights spent in the 2 busiest months		Cumulative share of the 2 busiest months	Share of the tourism nights spent in the 2 slowest months		Cumulative share of the 2 slowest months
EU-27	17% (Aug)	15% (Jul)	32%	5% (Nov)	5% (Jan)	9%
BE	15% (Jul)	13% (Aug)	28%	4% (Jan)	6% (Feb)	10%
BG	22% (Aug)	21% (Jul)	42%	3% (Nov)	3% (Jan)	6%
CZ	14% (Aug)	14% (Jul)	27%	5% (Dec)	6% (Nov)	11%
DK	24% (Jul)	15% (Aug)	38%	3% (Jan)	3% (Feb)	6%
DE	12% (Jul)	12% (Aug)	25%	5% (Jan)	6% (Dec)	11%
EE	15% (Jul)	13% (Aug)	28%	5% (Jan)	6% (Feb)	11%
IE	16% (Jul)	15% (Aug)	31%	4% (Jan)	4% (Feb)	9%
EL	21% (Aug)	20% (Jul)	41%	2% (Jan)	2% (Feb)	3%
ES	16% (Aug)	14% (Jul)	30%	5% (Dec)	5% (Jan)	9%
FR	22% (Aug)	19% (Jul)	41%	4% (Jan)	4% (Nov)	8%
IT	21% (Aug)	18% (Jul)	39%	3% (Nov)	4% (Dec)	7%
CY	16% (Aug)	14% (Jul)	30%	2% (Jan)	3% (Dec)	5%
LV	15% (Jul)	13% (Aug)	28%	5% (Dec)	6% (Jan)	11%
LT	15% (Aug)	15% (Jul)	31%	5% (Dec)	5% (Jan)	10%
LU	19% (Jul)	14% (Aug)	33%	4% (Jan)	4% (Dec)	8%
HU	16% (Aug)	16% (Jul)	32%	4% (Jan)	5% (Feb)	9%
MT	13% (Aug)	13% (Jul)	26%	4% (Dec)	5% (Jan)	9%
NL	16% (Aug)	14% (Jul)	30%	4% (Jan)	5% (Dec)	9%
AT	12% (Aug)	12% (Feb)	25%	3% (Nov)	4% (Apr)	7%
PL	16% (Jul)	15% (Aug)	31%	5% (Jan)	5% (Dec)	10%
PT	17% (Aug)	13% (Jul)	30%	4% (Dec)	4% (Jan)	8%
RO	17% (Aug)	16% (Jul)	32%	4% (Jan)	5% (Feb)	9%
SI	16% (Aug)	15% (Jul)	31%	5% (Nov)	6% (Jan)	11%
SK	15% (Jul)	14% (Aug)	28%	5% (Dec)	6% (Nov)	11%
FI	15% (Jul)	11% (Aug)	26%	6% (Nov)	6% (Dec)	13%
SE	14% (Jul)	11% (Aug)	25%	6% (Dec)	6% (Jan)	12%
UK	15% (Aug)	14% (Jul)	29%	4% (Jan)	5% (Dec)	9%
HR	27% (Jul)	26% (Aug)	53%	1% (Jan)	1% (Dec)	2%
CH	12% (Aug)	11% (Jul)	23%	5% (Nov)	6% (Apr)	11%
IS	27% (Jul)	21% (Aug)	48%	3% (Dec)	3% (Jan)	5%
LI	11% (Aug)	11% (Mar)	22%	6% (Nov)	6% (Apr)	12%
NO	19% (Jul)	14% (Aug)	33%	4% (Dec)	5% (Nov)	9%

Source: Eurostat, Tourism Statistics.

Notes: (1) FR: data for "Other collective accommodation" included from May to September ; (2) CH and LI: only "Hotels and similar accommodation" ; (3) IE: estimated data.



July and August were the peak months in 2008 (see Table 13), in all countries except for Austria and Liechtenstein, where the second place was taken by the winter months of February and March respectively. November, December, January and February tended to be the typical low season months, except for those countries that are important winter sports destinations, such as Austria, Switzerland and Liechtenstein.

Seasonality did differ across Europe, with the strongest seasonality being recorded in Croatia. In this EU candidate country, more than half of the nights spent (53%) were registered during the two summer months of July and August. In Iceland, too, tourism tended to be concentrated in the two summer months (48% of all nights spent during 2008).

In the European Union, Bulgaria (42%), Greece (41%) and France (41%) showed the highest summer peak. In terms of seasonality, Greece recorded more than 12 times as many guest nights during July and August as in January and February. The seasonality was less pronounced in Germany, Sweden and Finland, where the number of nights spent during July and August was 'only' 2 to 2.5 times higher than the number of nights spent during the two lowest months.

VI. Employment

The previous chapters discussed the travel volume, behaviour and preferences of European tourists and the performance of the accommodation sector in the EU. This chapter takes a look at the tourism industry's contribution to the labour market in the European Union, focusing on the pattern of employment in the tourist accommodation sector.

Recent estimates based on tourism satellite accounts (TSA) estimated the total employment in the tourist industry in the EU at somewhere between 12 and 14 million persons employed. However, given that the TSA exercises are currently not harmonised across the EU, this chapter concentrates on data from the European Labour Force Survey. Although data are available for all EU Member States, a major shortcoming of this source is that the discussion is confined to the tourist accommodation sector (NACE 56) alone, which represents only about one fifth to one sixth of the total employment in the tourism industry. On the other hand, significant added value is provided by the availability of employment data broken down not only by the socio-demographic background of the worker, but also by aspects of the working conditions.

VI.1 The tourist accommodation sector in the EU employs 2.3 million people

Around 9.5 million persons were employed in the "HORECA" (hotels, restaurants, catering) sector in the EU in 2008 (see Table 14). This is equivalent to 4.3% of all persons employed in the European Union. The highest number was recorded in Germany (1.53 million persons employed), closely followed by Spain (1.45 million). When the size of the labour market is taken into account, the highest shares of people employed in the HORECA sector were found in Malta (8.6%), Spain (7.7%), Cyprus (7.5%) and Greece (6.9%).

In 2008, almost one out of every four persons employed in the HORECA sector worked in an establishment providing tourist accommodation. The accommodation sector represented over 2.3 million jobs, corresponding to 1.1% of all persons employed in the European Union. One third of the employment in the accommodation sector was allocated to Germany (449 thousand persons employed) and Spain (322 thousand). The Member States with the largest shares of employment in tourist accommodation were Malta (5.4%) and Cyprus (3.0%).

Table 14: Number of persons employed, by economic activity, 2008 (in thousands)

	Total employment (All NACE)	Horeca sector (NACE divisions 55+56)		Accommodation sector (NACE division 55)	
	Number of persons employed (in thousands)	Number of persons employed (in thousands)	Share in total employment	Number of persons employed (in thousands)	Share in total employment
EU-27	218 277	9 490	4.3%	2 315	1.1%
BE	4 396	149	3.4%	27	0.6%
BG	3 300	167	5.1%	43	1.3%
CZ	4 941	186	3.8%	49	1.0%
DK	2 788	85	3.1%	18	0.7%
DE	38 646	1 534	4.0%	449	1.2%
EE	593	23	3.9%	:	:
IE	1 928	119	6.2%	45	2.3%
EL	4 532	315	6.9%	70	1.6%
ES	18 945	1 452	7.7%	322	1.7%
FR	25 880	907	3.5%	219	0.8%
IT	23 203	1 185	5.1%	238	1.0%
CY	383	29	7.5%	12	3.0%
LV	999	24	2.4%	4	0.4%
LT	1 422	36	2.6%	:	:
LU	219	5	2.5%	:	:
HU	3 797	159	4.2%	33	0.9%
MT	161	14	8.6%	9	5.4%
NL	8 602	330	3.8%	74	0.9%
AT	4 080	252	6.2%	89	2.2%
PL	15 846	324	2.0%	93	0.6%
PT	5 076	297	5.9%	56	1.1%
RO	9 381	176	1.9%	50	0.5%
SI	981	37	3.8%	:	:
SK	2 378	107	4.5%	29	1.2%
FI	2 497	86	3.5%	15	0.6%
SE	4 525	150	3.3%	39	0.9%
UK	28 777	1 342	4.7%	308	1.1%
HR	1 611	86	5.3%	:	:
TR	21 455	1 053	4.9%	190	0.9%
CH	4 229	148	3.5%	49	1.2%
IS	166	8	4.8%	2	1.3%
NO	2 516	69	2.7%	25	1.0%
MK	607	17	2.9%	17	2.9%

Source: Eurostat, EU Labour Force Survey.

Notes: (1) CH, MK: data is not an annual average but refers to the second quarter of 2008.

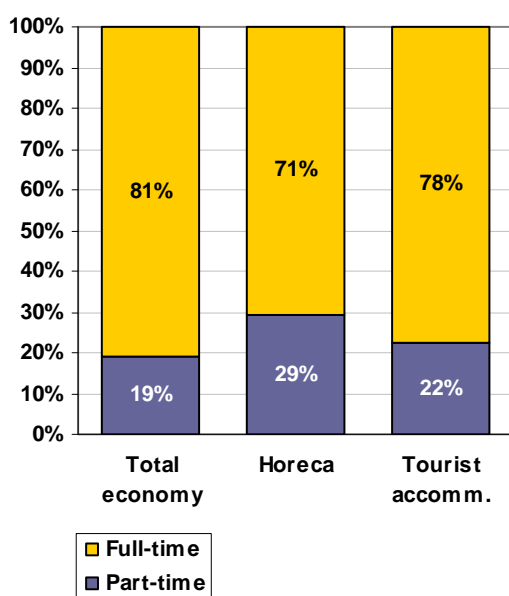
VI.2 Tourist accommodation is a source of jobs for certain at-risk groups on the European labour market

As mentioned, the data from the Labour Force Survey give an insight into the labour market, beyond the absolute figures on employment. Graphs 19 to 23 below discuss several aspects of jobs in the accommodation sector, each time compared with the HORECA sector as a whole and with the entire economy.

In 2008, the accommodation sector had a higher share of part-time employment compared with the entire economy (see Graph 19). However, at a rate of 22%, part-time employment in the accommodation sector is significantly lower than in the HORECA sector as a whole (29%).

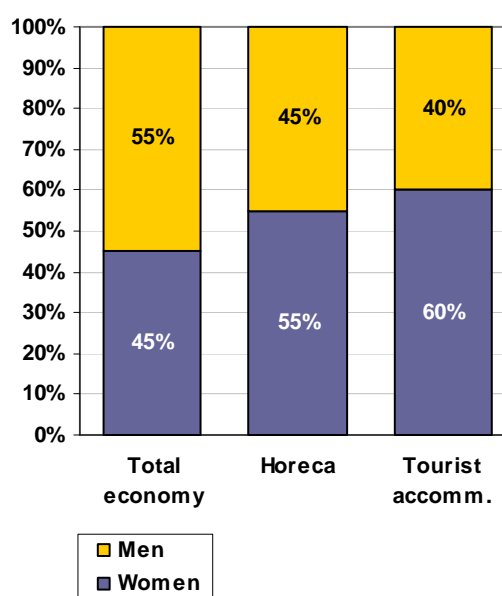
The tourist accommodation sector was a major employer of women in 2008 (see Graph 20). On average, 60% of the labour force in this sector consisted of female workers, while they made up only 45% of the persons employed in the entire economy in the EU. In terms of creating job opportunities for women, the accommodation sector scored even better than the hotels and restaurants sector as a whole – with female employment at 55%.

Graph 19: Share of persons employed, by economic activity and full-time/part-time, EU-27, 2008




Source: Eurostat, EU Labour Force Survey.

Graph 20: Share of persons employed, by economic activity and gender, EU 27, 2008



Source: Eurostat, EU Labour Force Survey

About one out of every three persons employed in the tourist accommodation sector had a lower level of education, i.e. had completed lower secondary education at the most (see Graph 21). In this sector, 32% of persons employed did not complete upper secondary education, compared with a general labour market average of 23%. The share of persons with a higher educational level employed in the accommodation sector (15%) is about half of the share observed for the economy as a whole (28%). When comparing the tourist accommodation subsector with the

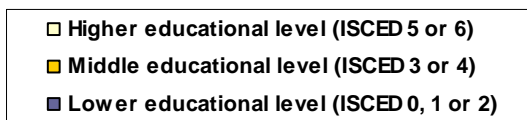
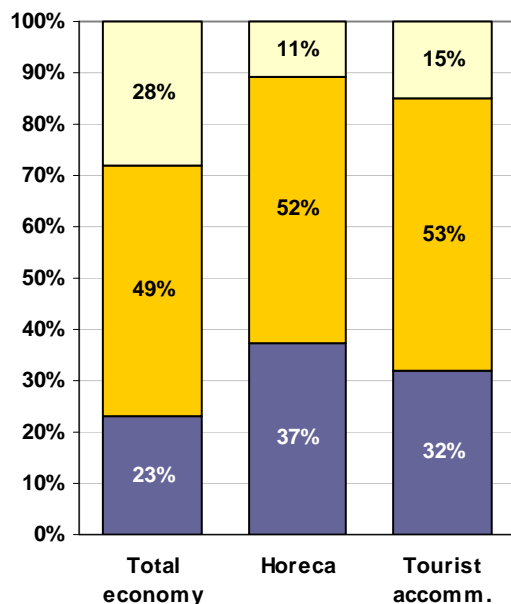


HORECA sector as a whole, those employed in the latter tended to have a lower level of formal education, with 29% of the labour force completing only the lower educational level as the highest completed level and just over 10% of the labour force having completed higher education.

Next to female workers and workers with a lower level of formal educational attainment, a third socio-demographic group strongly represented in the HORECA sector and in the accommodation sector during 2009 were younger workers (see Graph 22). These sectors offered job opportunities to a younger workforce. With 47% of persons employed in hotels and restaurants and 43% in the tourist accommodation sector aged under 35, both had a much younger age profile than the rest of the EU labour market, where only about one in three of those employed was under 35.

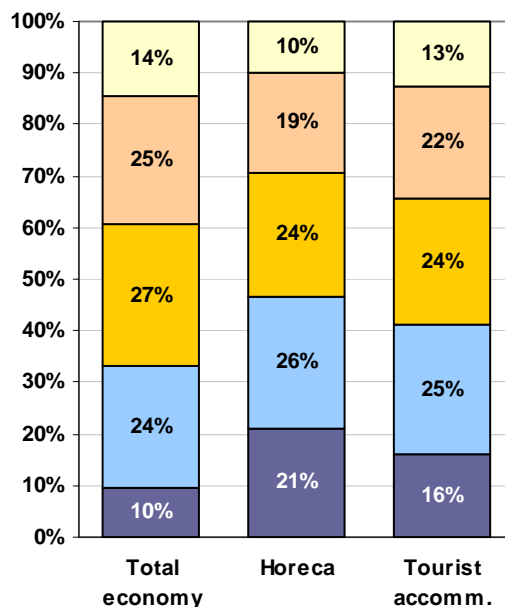
While Graph 19 above already pointed to the relatively high share of part-time employment in the accommodation sector, Graph 23 takes a look at the average time an employee stays with the same employer. The jobs offered in this sector were clearly less stable than in the rest of the labour market. Staff turnover was much higher in the accommodation sector – with employees staying with the same employer for an average of 6.5 years (79 months) – than in all economic activities taken together (123 months, or more than 10 years). Nevertheless, the accommodation sector tended to be slightly more stable than the entire HORECA sector where the average stay with the employer was just under 5.5 years (65 months).

Graph 21: Share of persons employed, by economic activity and educational level, EU 27, 2008



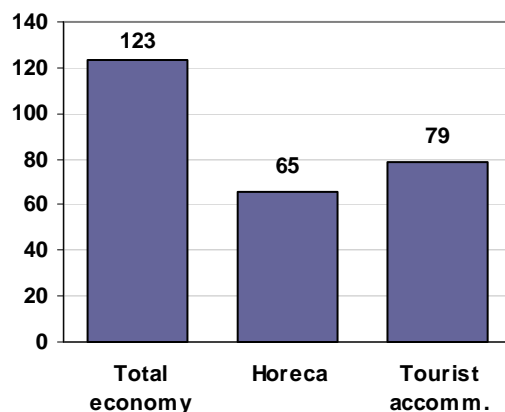
Source: Eurostat, EU Labour Force Survey.

Graph 22: Share of persons employed, by economic activity and age group, EU 27, 2008



Source: Eurostat, EU Labour Force Survey.

Graph 23: Average stay with the same employer (in months), by economic activity, EU-27, 2008



Source: Eurostat, EU Labour Force Survey.

VII. Balance of payments

The economic importance of tourism in an international context can be measured using different methods, one of these being the ratio of international tourism receipts relative to gross domestic product (GDP).

VII.1 Spain was the biggest earner and Germany the biggest spender in international travel

In 2008, the ratio of international tourism receipts to GDP was highest in Malta (11.4%) and Cyprus (10.8%), confirming the importance of tourism for these island countries (see Table 18). The lowest ratio was recorded in Romania (1.0%), followed by Germany (1.1%). For both countries, international tourism, or inbound tourism in particular, appeared to be of lesser importance. Table 11 shows Romania and Germany recording the highest share of residents' nights as a percentage of the total guest nights spent in collective accommodation.

When looking at the flows in absolute terms, the highest international tourism receipts were recorded in Spain (42 billion euro), followed by France (38 billion), Italy (31 billion), Germany (27 billion) and the United Kingdom (25 billion).

On the debit side, the biggest spender in terms of international travel was Germany, which spent close to 62 billion euro during 2008. Some distance behind German travellers came those from the United Kingdom (47 billion), France (29 billion) and Italy (21 billion).

When taking into account the size of the country and looking at the tourism expenditure per inhabitant (not shown in the table), residents of Luxembourg are ranked top, with each inhabitant spending on average 5 413 euro on travelling abroad, leaving runner-up Ireland a long way behind (on 1 619 euro). Cyprus (1 362 euro), Belgium (1 231 euro) and Denmark (1 223 euro) completed the top five. This observation was consistent with the fact that these countries also ranked among the top countries in terms of the share of outbound trips of four nights or more in the total number of holiday trips (see Table 3).

Comparing the credits and debits related to international travel, the most positive balance was measured for Spain, where a credit of nearly 42 billion euro and a debit of around 14 billion euro resulted in a balance of 28.1 billion euro. Within the European Union, Italy ranked second with a balance of 10.1 billion euro, followed by Greece (9.0 billion) and Austria (7.0 billion). Other top destinations for tourism in Europe also posted a very positive balance for the travel item of the Balance of Payments: the candidate countries Turkey and Croatia recorded a balance of 12.5 billion and 6.7 billion euro respectively. Germany, with the highest deficit on the travel item balance at 34.6 billion euro, was followed by the United Kingdom (22.3 billion), the Netherlands (5.7 billion) and Belgium (5.1 billion).

Table 15: Tourism receipts and expenditure, 2008 (in million euro)

	Receipts: credit (in million €)	Ranking within EU-27	Expenditure: debit (in million €)	Ranking within EU-27	Balance: receipts minus expenditure (in million €)	Ranking within EU-27	International tourism receipts relative to GDP
BE	7 991	11	13 075	7	-5 084	24	2.3%
BG	2 536	18	1 617	19	919	11	7.4%
CZ	5 245	13	3 114	13	2 131	7	3.5%
DK	4 571	14	6 677	12	-2 106	22	2.0%
DE	27 209	4	61 854	1	-34 645	27	1.1%
EE	820	25	550	26	270	16	5.1%
IE	4 279	15	7 055	10	-2 776	23	2.4%
EL	11 636	7	2 680	17	8 956	3	4.9%
ES	41 901	1	13 834	6	28 067	1	3.8%
FR	37 799	2	29 336	3	8 463	4	1.9%
IT	31 033	3	20 866	4	10 167	2	2.0%
CY	1 863	21	1 068	22	795	12	10.8%
LV	546	27	775	25	-229	19	2.4%
LT	902	24	1 005	23	-103	17	2.8%
LU	3 048	17	2 598	18	450	13	7.7%
HU	4 097	16	2 738	16	1 359	8	3.9%
MT	647	26	296	27	351	14	11.4%
NL	9 071	8	14 777	5	-5 706	25	1.5%
AT	14 677	6	7 721	9	6 956	5	5.2%
PL	8 016	10	6 684	11	1 332	9	2.2%
PT	7 440	12	2 939	15	4 501	6	4.5%
RO	1 357	23	1 476	20	-119	18	1.0%
SI	1 931	20	895	24	1 036	10	5.2%
SK	1 770	22	1 474	21	296	15	2.7%
FI	2 181	19	3 054	14	-873	20	1.2%
SE	8 579	9	10 462	8	-1 883	21	2.6%
UK	24 614	5	46 923	2	-22 309	26	1.4%
HR	7 468	:	765	:	6 703	:	15.8%
TR	14 905	:	2 394	:	12 511	:	3.0%
NO	3 131	:	10 751	:	-7 620	:	1.0%
IS	394	:	742	:	-348	:	3.8%

Source: Eurostat, Balance of payments statistics – travel item.

Notes: (1) The travel item of the Balance of Payments is based on concepts and definitions that are slightly different from those used in tourism statistics. Important differences concern the inclusion of all travellers in BoP (e.g. cross-border commuters) and the exclusion of transactions relating to transport; (2) GDP: gross domestic

ENDNOTES

Country abbreviations

EU-27 or EU: European Union	ES: Spain FR: France IT: Italy	PL: Poland PT: Portugal RO: Romania	LI: Liechtenstein NO: Norway
BE: Belgium BG: Bulgaria CZ: Czech Republic DK: Denmark DE: Germany EE: Estonia IE: Ireland EL: Greece	CY: Cyprus LV: Latvia LT: Lithuania LU: Luxembourg HU: Hungary MT: Malta NL: Netherlands AT: Austria	SI: Slovenia SK: Slovakia FI: Finland SE: Sweden UK: United Kingdom CH: Switzerland IS: Iceland	HR: Croatia TR: Turkey MK: Former Yugoslav Republic of Macedonia

Symbols

“.”: no data available or unreliable figures that cannot be published.

Rounding

Due to rounding, summary figures in the text or in tables/graphs do not always correspond to the detailed figures in the tables/graphs, e.g. "19%" as the sum of 10.4% (rounded in a table to "10%") and 8.4% (rounded in a table to "8%").

Extractions dates

- Chapter III : 16/10/2009
- Chapter IV: 29/10/2009
- Chapter V: 08/12/2009
- Chapter VI: 09/12/2009
- Chapter VII: 11/12/2009

European Commission

Tourism statistics in the European Statistical System - 2008 data

Luxembourg: Publications Office of the European Union

2010 - 59 p. - 21 x 29.7 cm

ISBN 978-92-79-15906-0

ISSN 1977-0375

doi: 10.2785/50703

Cat. No KS-RA-10-010-EN-N

Theme: Industry, trade and services

Collection: Methodologies and working papers



Publications Office

ISBN 978-92-79-15906-0



9 789279 159060