

Panorama on tourism



2008 edition

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Luxembourg: Office for Official Publications of the European Communities, 2008

ISBN 978-92-79-05151-7

DOI 10.2785/1475

Cat. No. KS-30-08-550-EN-N

(Cat. No. printed publication KS-30-08-550-EN-C)

Theme: Population and social conditions - Industry, trade and services

Collection: Statistical books

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ACKNOWLEDGMENTS

This publication has been produced by the Information Society and Tourism Statistics Unit (F-6) of Eurostat, under the Head of Unit, Mr Michail Skaliotis.

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Data extraction

Date of data extraction: 29 February 2008



CHAPTER 1 - THE TOURISM SECTOR IN EUROPE
MAIN FEATURES

1. THE TOURISM SECTOR IN EUROPE: MAIN FEATURES

1.1 Recent trends, 2000-2006

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

Looking within Europe, however, shows a different trend between western and southern countries and northern and

eastern Europe over the period analysed. The first group of countries still lead the market, but have generally seen a fall in international demand. The second group, on the other hand, has shown a significant growth in both incoming and outgoing flows, much of it to and from the rest of Europe.

This section discusses the overall trends in tourism in Europe, in terms of flows and economic transactions.

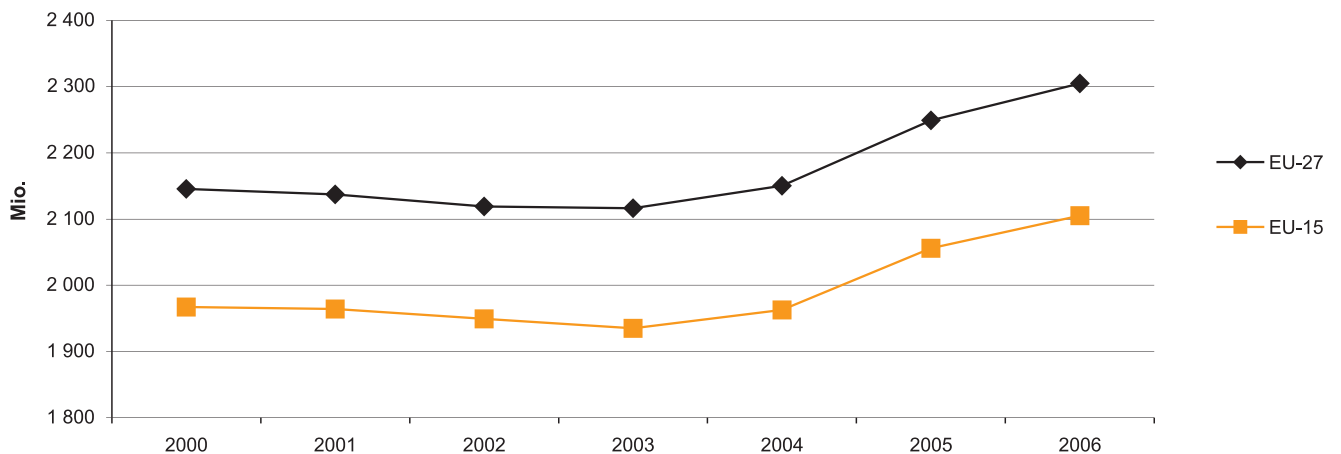
1.1.1 Tourism in Europe

The number of tourism nights spent by residents and non-residents is the major indicator of the development of tourism (Figure 1.1). The two groups of countries considered, the EU-27 and the EU-15, showed an overall increase in the period from 2000 to 2006 of +1.3% and +1.1% respectively on average each year. However, the general picture is two-sided. Between 2000 and 2003 each of the two groups recorded a small but steady decrease each year, with the absolute number of nights falling from 2 146 million to 2 116 million in the EU-27 and from 1 967 million to 1 935 million in the EU-15. Between 2003

and 2006 both groups showed a recovery, with an average growth of +2.9% each year. In 2004, the total number of nights in the EU-27 surpassed the value recorded in 2000. In the EU-15, the same happened in 2005, meaning that the recovery in the EU-27 was led by the new Member States.

During the whole period, the "old" Member States' share in total nights decreased only slightly whereas in general the new Member States showed the highest growth rates, especially in the years 2004, 2005 and 2006.

Figure 1.1 - Evolution of nights spent, 2000 to 2006 (million)



Note: EU-27 includes estimates for RO for the period 2002 to 2005.

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In 2006, hotels and similar establishments hosted about 1 525 million nights in the EU-27 area (66% of total nights in all collective accommodation establishments), with an average growth rate of +1.1% between 2000 and 2006 (Table 1.1). About 34% of tourist nights were spent in other collective accommodation, which are composed of 15.5% in tourist campsites, 8.6% in holiday dwellings and 9.8% in other collective accommodation not elsewhere classified (n.e.c.). Amongst these three groups of non-hotel establishments, other collective accommodation (n.e.c.) recorded the highest increase in nights between 2000 and 2006 (+2.6% on average each year), followed by campsites (+1.8%). Unlike these two types of accommodation, holiday dwellings stagnated over the same period (-0.3% on average each year).

Table 1.1 - Tourist nights by type of accommodation in the EU-27, 2006

Type of accommodation	1 000 nights	Share of total	Average annual growth rate 2000-2006
Total	2 304 499	100.0	1.2
Hotels	1 524 990	66.2	1.1
Other collective accommodation	779 509	33.8	1.4
- Tourist campsites ¹	356 564	15.5	1.8
- Holiday dwellings ²	197 074	8.6	-0.3
- Other collective accommodation n.e.c.	225 871	9.8	2.6

1) No data available for MT. 2) No data available for IE, EL, FR, MT, PT, RO and UK.

Looking at the distribution of tourist nights by country (Table 1.2), in 2006, five countries (Spain, Italy, Germany, France and the United Kingdom) together accounted for 72.0% of total nights in the EU-27. All new Member States together recorded less than ten percent of the EU-27 total, with the highest values registered for Poland (2.2%) and the Czech Republic (1.8%).

Although lower in absolute terms, tourist nights spent in Bulgaria and the Baltic States recorded the highest growth between 2000 and 2006 (Bulgaria +12.5% on average each year, Estonia +17.7%, Latvia and Lithuania +13.1%). Other European countries where the average annual increase in nights was higher than the EU-27 average were Iceland (+5.6%), Croatia (+3.2%), Sweden (+3.1%), Germany (+2.7%), Slovenia (+2.3%), Ireland, Finland and Norway (+2.1% each), Spain (+1.6%), Portugal (+1.4%), Denmark, Italy and Austria (+1.3% each). On the other hand, a decline in nights was recorded in Cyprus (-3.1% on average each year), Liechtenstein (-1.5%), Greece (-1.2%), the Czech Republic (-1.1%), the United Kingdom (-1.0%) and Hungary (-0.6%).

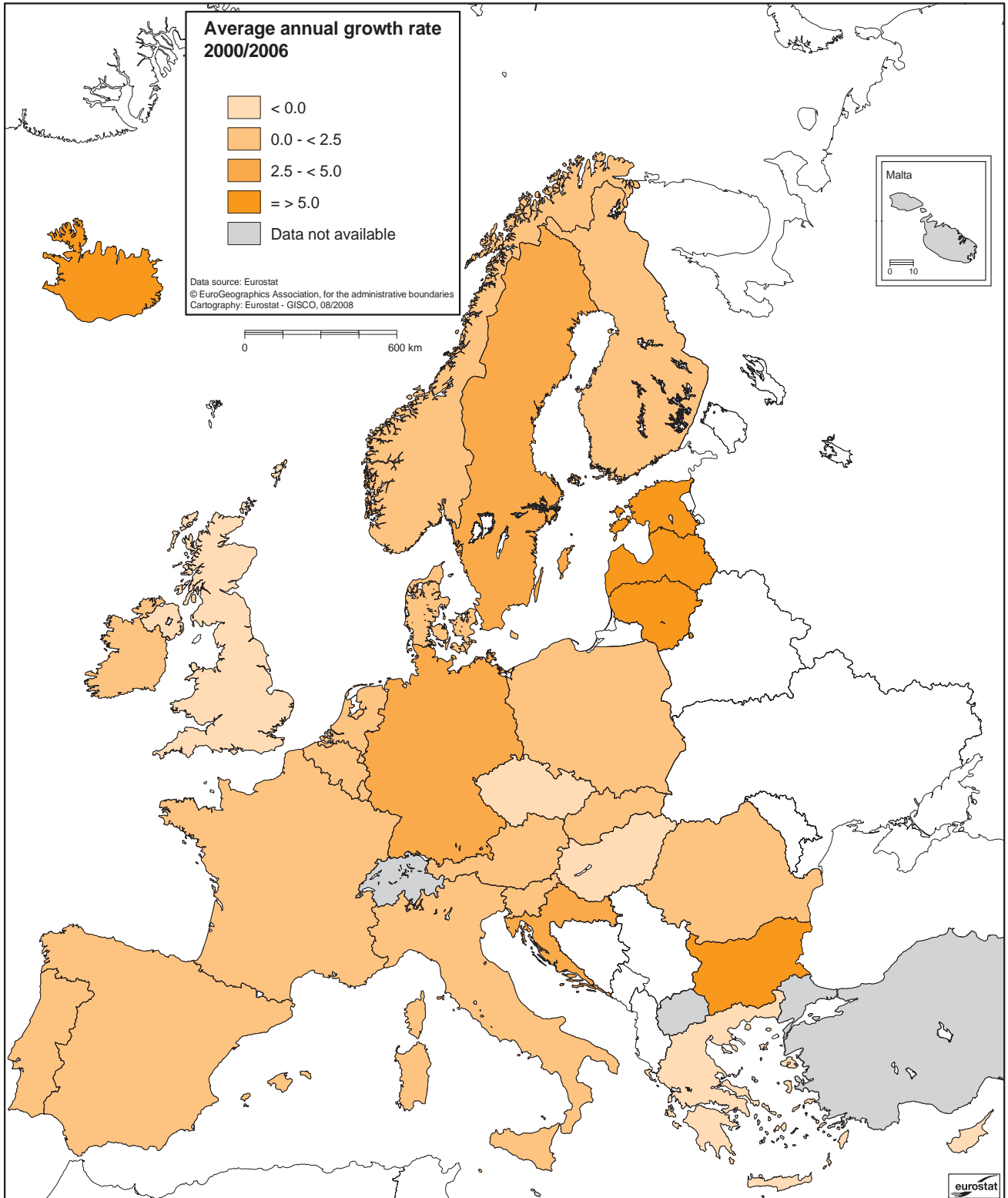
Table 1.2 - Tourist nights in European countries, 2006 (1 000)

	Nights spent 2006 (1 000)	% share in EU-27	Average annual growth rate 2000-2006
EU-27	2 304 499	100.0	1.2
BE	29 371	1.3	0.1
BG	17 355	0.8	12.5
CZ	41 448	1.8	-1.1
DK	27 267	1.2	1.3
DE	351 224	15.2	2.7
EE	4 543	0.2	17.7
IE	33 655	1.5	2.1
EL	57 797	2.5	-1.2
ES	379 276	16.4	1.6
FR	297 482	12.9	0.7
IT	366 764	15.9	1.3
CY	14 438	0.6	-3.1
LV	3 114	0.1	13.1
LT	2 936	0.1	13.1
LU	2 611	0.1	0.1
HU	19 652	0.9	-0.6
MT	7 407	0.3	:
NL	83 943	3.6	0.5
AT	98 130	4.3	1.3
PL	51 235	2.2	0.8
PT	45 521	2.0	1.4
RO	18 992	0.8	1.2
SI	7 448	0.3	2.3
SK	11 012	0.5	0.9
FI	18 168	0.8	2.1
SE	47 697	2.1	3.1
UK	266 013	11.5	-1.0
HR	37 345	1.6	3.2
MK ¹	:	:	:
TR	:	:	:
IS	2 411	0.1	5.6
LI	170	0.0	-1.5
NO	27 489	1.2	2.1
CH	:	:	:

1) Provisional code which does not prejudice in any way the definitive nomenclature for this country, which will be agreed following the conclusion of negotiations currently taking place on this subject at the United Nations.

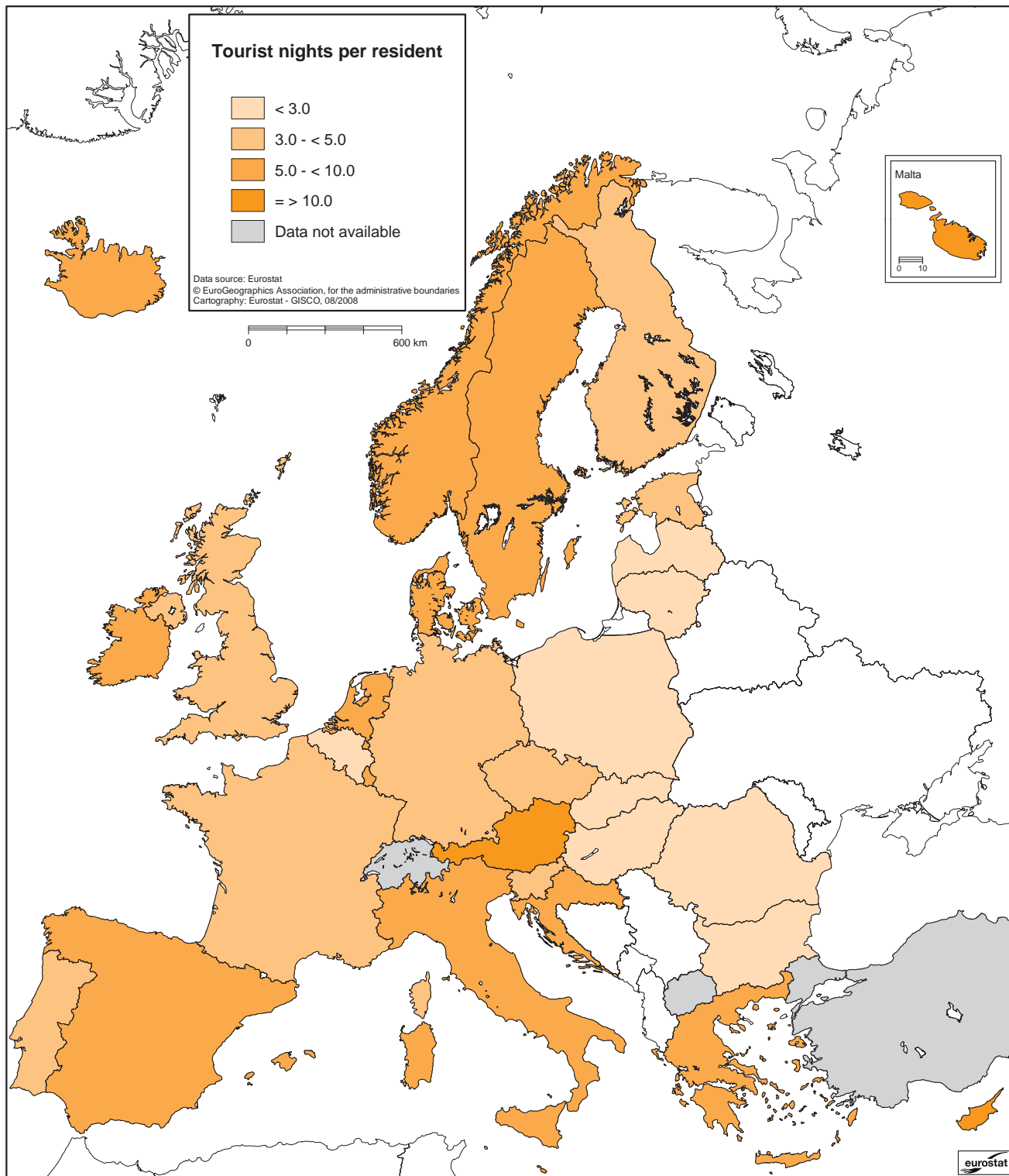
Scandinavian countries performed well, together with Slovenia, Ireland, the countries of the Iberian Peninsula, Italy and Austria between 2000 and 2006. In Sweden, Finland, Slovenia, Italy and Austria the increase was driven by international tourism, in Norway, Ireland, Spain and Portugal by domestic tourism. The decrease in Greece, Cyprus and Hungary was mainly due to a fall in non-resident tourist nights (Map 1.1).

Map 1.1 - Evolution of tourist nights in collective accommodation between 2000 and 2006 (%)



THE TOURISM SECTOR IN EUROPE: MAIN FEATURES

Map 1.2 - Tourism intensity in European countries, 2006



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Looking at the intensity of tourism in European countries in 2006 (Map 1.2), measured by the number of total nights per resident, values above 7.5 are recorded by countries where tourism demand is very high in relation to population (such as the islands of Cyprus and Malta) and where long-stay tourism is prevalent (e.g. holiday tourism either at the beaches or in the mountains). In Cyprus and Malta, the nights/resident ratio in 2006 was 18.8 and 18.3 respectively, in Austria 11.9. On the other hand, very low values were recorded in emerging tourism destinations (new Member States) and in countries where short-stay tourism prevails (city breaks, business tourism, etc.). For example, the nights/resident ratio was below 3.0 in Belgium, Bulgaria, Hungary, Slovakia, Latvia, Poland, Lithuania and Romania. In the most popular tourism destinations in Europe, the figures were 8.7 in Spain, 6.2 in Italy, 5.2 in Greece and 4.7 in France. These differences are the result of a varied population size, on the one hand, and preferences of the tourists, on the other.

Comparing 2006 and 2000 data (Table 1.3), Cyprus showed the strongest decrease in the number of nights per resident over the whole period (from 25.2 to 18.8), followed by Liechtenstein (from 5.8 to 4.9) and the United Kingdom (from 4.8 to 4.4). In contrast, Iceland recorded good growth in the same period (from 6.2 to 8.0), along with Croatia (from 6.9 to 8.4), Germany, Austria and Sweden (with an increase of between 0.6 and 0.8 percentage points each). Among the new Member States, the highest growth in tourism intensity was recorded by Bulgaria (from 1.0 to 2.2), Estonia (from 1.2 to 3.4) and Latvia (from 0.6 to 1.4). In the most popular tourism destinations (Spain, France and Italy), the ratio was relatively stable over the period analysed.

1.1.2 Inbound tourism

Focusing on international tourism, Table 1.4 shows the evolution of nights spent by non-residents in the EU-27 and the EU-15 from 2000 to 2006, in terms of both absolute values and annual rates of change. With about 955 million nights in 2006, international tourism in the EU-27 recorded good growth over the whole period (+1.2% on average each year), which was headed by the new Member States. Although only accounting for about 10% of nights spent by non-residents in the EU-27, these countries recorded annual average growth of +5.3% for international tourism between 2000 and 2006, against +0.8% in the EU-15.

Table 1.3 - Tourism intensity in European countries - Tourist nights per resident, 2000 and 2006

	Tourism intensity Tourist nights per resident	
	2000	2006
EU-27 ¹	4.4	4.7
EU-15	5.2	5.4
BE	2.9	2.8
BG	1.0	2.2
CZ	4.3	4.0
DK	4.7	5.0
DE	3.6	4.3
EE	1.2	3.4
IE	7.9	8.0
EL	5.7	5.2
ES	8.6	8.7
FR	4.7	4.7
IT	6.0	6.2
CY	25.2	18.8
LV	0.6	1.4
LT	0.4	0.9
LU	6.0	5.6
HU	2.0	2.0
MT	:	18.3
NL	5.1	5.1
AT	11.3	11.9
PL	1.3	1.3
PT	4.1	4.3
RO	0.8	0.9
SI	3.3	3.7
SK	1.9	2.0
FI	3.1	3.5
SE	4.5	5.3
UK	4.8	4.4
HR	6.9	8.4
MK ²	0.7	:
TR	:	:
IS	6.2	8.0
LI	5.8	4.9
NO	5.4	5.9
CH	9.6	:

1) Excludes MT for 2000. 2) Provisional code which does not prejudice in any way the definitive nomenclature for this country, which will be agreed following the conclusion of negotiations currently taking place on this subject at the United Nations.

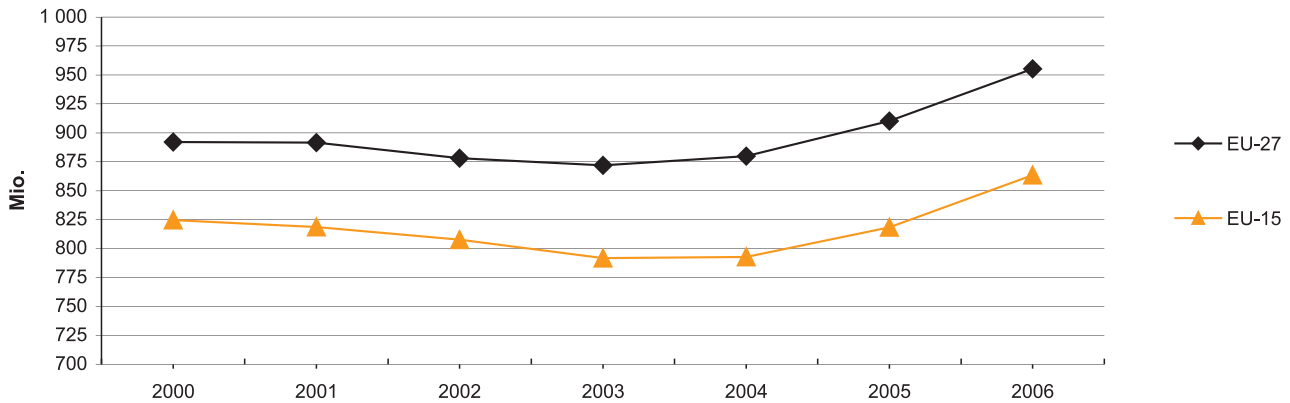
Table 1.4 - Evolution of non-resident tourist nights in the EU-27, in total and by area, 2000 to 2006

Nights spent of non-residents (1 000)	2000	2001	2002	2003	2004	2005	2006
EU-27 ¹	891 931	891 427	877 963	871 733	879 703	910 221	955 303
EU-15	824 531	818 624	807 578	791 666	792 706	818 259	863 224
Annual change rate %	2000	2001	2002	2003	2004	2005	2006
EU-27		-0.1	-1.5	-0.7	0.9	3.5	5.0
EU-15		-0.7	-1.3	-2.0	0.1	3.2	5.5
Market share %	2000	2001	2002	2003	2004	2005	2006
EU-27	100.0	100.0	100.0	100.0	100.0	100.0	100.0
EU-15	92.4	91.8	92.0	90.8	90.1	89.9	90.4

1) Includes estimates for RO for the period 2002 to 2005.

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Figure 1.2 - Evolution of non-resident tourist nights, 2000 to 2006 (million)



Note: EU-27 includes estimates for RO for the period 2002 to 2005.

Looking at the annual trend (Table 1.4 and Figure 1.2), international nights in the EU-27 grew by +5.0% in 2006, strengthening the recovery shown in 2004 and 2005 (+0.9% and 3.5%, respectively) after a three-year negative trend. Compared with the trend in EU-15 non-resident nights over the same period, it can be seen that the positive performance of new Member States partially compensated for the decline of international nights in the "old" ones between 2000 and 2004 (from 824.5 million to 792.7 million). From 2003 to 2004 and from 2004 to 2005, international tourism in the EU-15 rose at a lower rate than in the EU-27 (+0.1% versus +0.9% in 2004, +3.2% versus +3.5% in 2005). The only exception is 2006, when EU-15 countries performed slightly better than the EU-27 average (+5.5% versus +5.0%).

Table 1.5 - Non-resident tourist nights by type of accommodation in the EU-27, 2006

Type of accommodation	1 000 nights	Share of total	Average annual growth rate 2000-2006
Total	955 303	100.0	1.2
Hotels	705 287	73.8	1.3
Other collective accommodation	250 016	26.2	0.2
- Tourist campsites ¹	108 882	11.4	1.3
- Holiday dwellings ²	90 890	9.5	-2.9
- Other collective accommodation n.e.c.	50 244	5.3	5.0

1) Excludes MT. 2) Excludes IE, MT, PT and RO.

In 2006, 73.8% of total international tourism nights in the EU-27 were spent in hotels, with an average annual increase of +1.3% from 2000 to 2006 (Table 1.5). Other collective accommodation accounted for 26.2% of these nights, with tourist campsites and holiday dwellings showing shares of 11.4% and 9.5% respectively. Taking into account the dynamics of non-hotel establishments, other collective accommodation n.e.c., which accounted for about 5.3% of total international nights, recorded the highest increase in nights between 2000 and 2006 (+5.0% on average each year), followed by campsites and hotels (each +1.3%). On the other hand, holiday dwellings showed an average decrease of -2.9% per year from 2000 to 2006.

Table 1.6 - Non-resident tourist nights in European countries, 2006 (1 000)

	Nights spent of non-residents 2006	% share in EU-27	Average annual growth rate 2000-2006
EU-27	955 303	100.0	1.2
BE	16 039	1.7	0.5
BG	11 945	1.2	15.0
CZ	20 090	2.1	4.3
DK	9 453	1.0	-0.9
DE	52 947	5.5	3.8
EE	3 020	0.3	15.8
IE	21 652	2.3	0.9
EL	43 055	4.5	-1.5
ES	224 518	23.4	-0.7
FR	105 865	11.1	-0.6
IT	156 861	16.4	1.9
CY	13 310	1.4	-3.8
LV	1 872	0.2	17.9
LT	1 514	0.2	15.6
LU	2 400	0.3	0.1
HU	10 046	1.0	-1.8
MT	7 092	0.7	:
NL	26 887	2.8	0.6
AT	70 017	7.3	1.4
PL	10 555	1.1	7.4
PT	26 842	2.8	0.7
RO	3 242	0.3	7.1
SI	4 332	0.5	4.8
SK	5 058	0.5	5.3
FI	5 004	0.5	3.5
SE	10 943	1.1	4.0
UK	90 741	9.5	3.5
HR	32 858	3.4	3.6
MK ¹	:	:	:
TR	:	:	:
IS	1 688	0.2	6.7
LI	155	0.0	-1.3
NO	7 921	0.8	1.0
CH	:	:	:

1) Provisional code which does not prejudice in any way the definitive nomenclature for this country, which will be agreed following the conclusion of negotiations currently taking place on this subject at the United Nations.

Looking at the distribution of non-resident tourist nights by country (Table 1.6), in 2006, only three countries (Spain, Italy and France) together accounted for slightly more than half (50.9%) of total international nights in the EU-27. Adding the United Kingdom and Austria to the previous country group, more than two-thirds (67.7) of all non-resident tourist nights in the EU-27 are recorded for these five countries. Although lower in absolute terms, Bulgaria and the Baltic States recorded the highest average annual growth rates between 2000 and 2006 (Latvia +17.9%, Estonia +15.8%, Lithuania +15.6%, Bulgaria +15.0%). Other countries where the average annual increase in

nights spent by non-residents was higher than the EU-27 average were Poland (+7.4%), Romania (+7.1%), Iceland (+6.7%), Slovakia (+5.3%), Slovenia (+4.8%), the Czech Republic (+4.3%) and, of the "old" Member States, Sweden (+4.0%), Germany (+3.8%) and Finland (+3.5%). With the exception of Italy (+1.9%) the other popular tourist destinations recorded a decline in the number of non-resident nights (Greece -1.5% on average each year, Spain -0.7%, France -0.6%). Negative values were also recorded by Cyprus (-3.8% on average each year), Hungary (-1.8%), Liechtenstein (-1.3%) and Denmark (-0.9%).

1.1.3 Tourism receipts and expenditure

Table 1.7 - Evolution of tourism receipts in the EU-27, in total and by area, 2000 to 2006

Receipts (EUR billion)	2000	2001	2002	2003	2004	2005	2006
EU-27 ¹	215.3	217.2	218.1	213.5	224.7	235.3	243.2
EU-15 ¹	194.8	196.3	199.1	195.5	205.1	213.5	219.5
Annual change rate %	2000	2001	2002	2003	2004	2005	2006
EU-27		0.9	0.4	-2.1	5.2	4.7	3.3
EU-15		0.7	1.4	-1.8	4.9	4.1	2.8
Market share %	2000	2001	2002	2003	2004	2005	2006
EU-27	100.0	100.0	100.0	100.0	100.0	100.0	100.0
EU-15	90.5	90.3	91.3	91.6	91.3	90.7	90.2

1) Excludes EL for 2006.

Turning to the economic transactions generated by international tourism, tourism receipts in the EU-27 performed well from 2000 to 2006 (+2.0% on average per year - Table 1.7).

The EU-27 area as a whole earned about EUR 243.2 bn in 2006, an increase of +3.3% in comparison to the previous year. This growth followed the good results of 2004 and 2005 (+5.2% and +4.7% respectively), offsetting the decrease in 2003 (-2.1%), which was mainly due to increased pressure on prices along with the strength of the euro. The EU-15 area, which accounted for about 90% of total international receipts in the EU-27 area as a whole, showed the same trend, recording EUR 219.5 bn in 2006 (+2.8% in comparison to 2005). However, the best performance of the last two years, albeit at lower absolute

values, was seen in the new Member States, whose receipts rose by +8.6% in 2004, +11.5% in 2005 and +8.7% in 2006, compensating for the losses of -9.3% in 2002 and -5.3% in 2003.

Tourism expenditure of European residents (Table 1.8), unlike receipts, showed steady growth throughout the period analysed, with an average annual growth rate of +2.4% between 2000 and 2006.

Expenditure by tourists from EU-27 countries on their trips abroad amounted to EUR 244.4 bn in 2006 (+2.0% in comparison to 2005), consolidating the steady increase recorded in 2005 (+6.0%) and 2004 (+3.6%), after relative stability in 2002 and 2003.

Table 1.8 - Evolution of tourism expenditure in the EU-27, in total and by area, 2000 to 2006

Expenditure (EUR billion)	2000	2001	2002	2003	2004	2005	2006
EU-27 ¹	211.4	216.3	218.0	218.1	226.0	239.5	244.4
EU-15 ¹	201.2	205.1	207.1	207.6	213.9	226.0	228.9
Annual change rate %	2000	2001	2002	2003	2004	2005	2006
EU-27		2.3	0.8	0.0	3.6	6.0	2.0
EU-15		1.9	1.0	0.3	3.0	5.7	1.3
Market share %	2000	2001	2002	2003	2004	2005	2006
EU-27	100.0	100.0	100.0	100.0	100.0	100.0	100.0
EU-15	95.2	94.8	95.0	95.2	94.6	94.4	93.7

1) Excludes EL for 2006.

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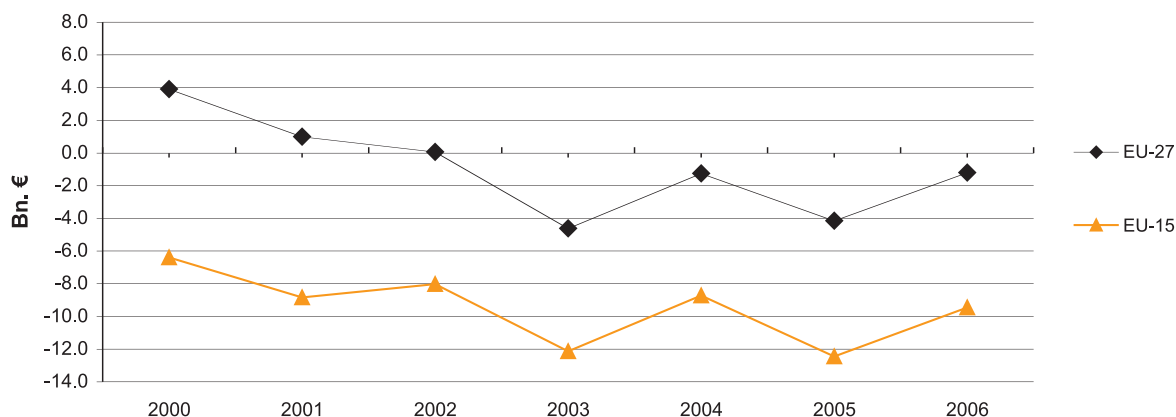
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From 2004 to 2006, the good performance was mainly driven by the boom in outbound tourism from the new Member States. Expenditure by residents in these countries increased by +15.1% in 2004, +11.7% in 2005 and +14.4% in 2006. Expenditure by residents in EU-15 countries, which accounted for about 94% of the total expenditure of the EU-27 area as a whole, grew by +3.0%, +5.7% and +1.3% respectively in those same years.

An analysis of economic transactions to and from each major area of Europe reveals those areas where the tourism balance is positive (i.e. tourism receipts exceeds tourism expenditure) compared with those where the balance is

negative (i.e. tourism expenditure exceeds tourism receipts). Looking at the EU-27 as a whole, the balance was negative from 2003 to 2006 (Figure 1.3). In the EU-15 countries, which accounted for about 90% of international receipts and around 94% of expenditure in 2006, the balance was negative over the entire period examined. On the other hand, the new Member States recorded a high volume of receipts (about 1.4 times higher than expenditure), generated by inbound tourism. The balance between receipts and expenditure in these countries was strongly positive, but it showed a slight decrease from 2000 to 2006, due to the dynamic growth of outbound tourism.

Figure 1.3 - Balance of tourism receipts and expenditure in the EU-27, 2000 to 2006 (EUR billion)



Note: Excludes EL for 2006.

1.1.4 Leading generators of international tourism

Table 1.9 - Top 10 generators of outbound tourism in the EU-27, 2000 and 2006 (nights spent)

Rank	Country	Nights spent - outbound (1 000)		Average annual growth rate % 2000-2006		Market share (%)	
		2000	2006	2000	2006	2000	2006
	TOTAL EU-27	1 924 547	2 247 512	2.6	100.0	100.0	
	Total top 10	1 862 598	2 019 026	1.3	96.8	89.8	
1	DE	908 925	748 809	-3.2	47.2	33.4	
2	UK	386 258	568 904	6.7	20.1	25.4	
3	FR	141 136	151 044	1.1	7.3	6.7	
4	NL	126 417	139 313	1.6	6.6	6.2	
5	IT	94 915	113 836	3.1	4.9	5.1	
8	ES	36 275	72 232	12.2	1.9	3.2	
6	BE	79 767	69 853	-2.2	4.1	3.1	
7	AT	55 730	58 285	0.7	2.9	2.6	
	9 PL ¹	:	53 777	:	:	2.4	
9	10 DK	33 175	42 973	4.4	1.7	1.9	

1) For 2000 no data available.

Turning to the most important countries of origin, Table 1.9 presents the leading generators of international tourism in the EU-27 in 2000 and 2006, in terms of nights spent on outbound trips of at least one night. The ranking is based on the data for 2006. A comparison with 2000 shows how the ranking has changed over time and reveals which countries have strengthened their position and which have lost ground over the last six years.

In terms of nights spent abroad, the top 10 countries of origin accounted for more than 2.0 billion nights in 2006, which corresponds to about 90% of total nights abroad within the EU-27. This resulted in average annual growth in the top 10 countries between 2000 and 2006 of +1.4%, which is lower than the EU-27 average (+2.6% per year). This means that the increase of outbound tourism from other EU countries, and particular from the new Member States, was growing at a higher rate.

Germany ranked first, with about 749 million nights in 2006 (33.3% of the EU-27 total), as against 909 million in 2000. This is an average annual decrease of -3.2%. The United Kingdom held second place with strong expansion in the number of nights abroad (+6.7% on average each year).

Overnight stays rose from 386 million in 2000 to 569 million in 2006 (25.3% of the EU-27 total). France came third, some way behind, with 151 million nights spent on outbound trips in 2006 (6.7% of the EU-27 total), as against 141 million in 2000. That is an increase of +1.1% on average per year. The Netherlands ranked fourth, with 139 million nights in 2006, which represented an average annual growth of +1.6% since 2000 and a market share of 6.2% in 2006. Italy and Spain followed, showing a higher average yearly growth of nights abroad in comparison with the top 10 average (+3.1% and +12.2% respectively). Spain in particular climbed to sixth in 2006 and, among the "old" Member States, recorded the highest growth of outbound tourism, with nights abroad doubling between 2000 and 2006 (from 36 million to 72 million). Belgium ranked seventh in 2006, showing a decrease in nights spent abroad, from 79.8 million to 69.9 million (-2.2% on average each year), accounting for 3.1% market share in 2006. Austria followed, with 58.3 million nights in 2006 (+0.7% on average each year since 2000) and a market share of +2.6%. In 2006, Poland climbed to ninth spot with about 53.8 million nights spent abroad (2.4% of the EU-27 total).

(from 88.6% in 2000 to 87.4% in 2006), meaning that expenditure by visitors from other EU countries was growing at a higher rate.

Germany ranked first, with nearly EUR 59.6 bn in 2006 (24.1% of the EU-27 total), against EUR 57.4 bn in 2000 (26.9%). The United Kingdom came second with a steady rise in expenditure abroad (+3.2% on average each year). Its international expenditure rose from EUR 41.6 bn in 2000 to EUR 50.3 bn in 2006, and its share in the EU-27 total from 19.5% to 20.4%. France held third place, with EUR 24.8 bn (10.1% of the EU-27 total), against EUR 19.2 bn in 2000 (9.0%), an increase of +4.4% on average per year. Italy came fourth, followed by Belgium, the Netherlands and Spain. It is interesting to note that expenditure by Spanish tourists abroad boomed. In 2006, they spent EUR 13.3 bn (5.4% of the EU-27 total) against 6.4 bn in 2000 (3.0%). This meant an annual average growth rate of +12.8%. Among the top 10 spenders, only Austria recorded a decrease in international tourism expenditure between 2000 and 2006 (from 9.2 bn to 7.4 bn, -3.6% on average each year), and fell from the seventh to ninth in the ranking, being passed by Spain and Sweden.

Table 1.10 - Top 10 tourism spenders of the EU-27, 2000 and 2006 (tourism expenditure, excluding transport)

Rank	Country	International tourism expenditure (EUR million)		Average annual growth rate % 2000-2006	Market share (%)	
		2000	2006		2000	2006
	TOTAL EU-27¹	213 131	246 815	2.5	100.0	100.0
	Total top 10	188 760	215 633	2.2	88.6	87.4
1	DE	57 427	59 596	0.6	26.9	24.1
2	UK	41 641	50 305	3.2	19.5	20.4
3	FR	19 227	24 840	4.4	9.0	10.1
4	IT	17 010	18 229	1.2	8.0	7.4
6	BE ²	10 736	13 687	6.3	5.0	5.5
5	NL	13 241	13 592	0.4	6.2	5.5
9	ES	6 454	13 265	12.8	3.0	5.4
8	SE	8 733	9 181	0.8	4.1	3.7
7	AT	9 216	7 407	-3.6	4.3	3.0
10	DK	5 075	5 531	1.4	2.4	2.2

1) 2006 includes 2005 data for EL. 2) 2002 data used for 2000, average annual growth rate 2002-2006.

Looking at the top 10 countries of origin in terms of total international expenditure (Table 1.10), the ranking is almost the same as for nights spent. In 2006, the leading countries accounted for about 87% of total expenditure abroad by visitors from EU-27 countries. Although the amount of money spent by these top 10 countries increased from 2000 to 2006 (from EUR 188.8 bn to 215.6 bn, +2.2% on average each year), their share in the total declined

1.1.5 Leading destinations of international tourism

Table 1.11 - Top 10 tourism destinations in the EU-27 (domestic and inbound), 2000 and 2006

Rank	Country	Nights spent by residents and non-residents (1 000)		Average annual growth rate % 2000-2006	Market share (%)	
		2000	2006		2000	2006
	TOTAL EU-27	2 145 658	2 304 499	1.2	100.0	100.0
	Total top 10	1 871 202	1 999 562	1.1	87.2	86.8
1	ES	344 664	379 276	1.6	16.1	16.4
2	IT	338 885	366 765	1.3	15.8	15.9
3	DE	298 488	351 224	2.7	13.9	15.2
4	FR	284 646	297 482	0.7	13.3	12.9
5	UK	281 756	266 013	-1.0	13.1	11.5
6	AT	90 711	98 130	1.3	4.2	4.3
7	NL	81 263	83 943	0.5	3.8	3.6
8	EL	62 186	57 797	-1.2	2.9	2.5
9	PL	48 794	51 235	0.8	2.3	2.2
12	SE	39 809	47 697	3.1	1.9	2.1

Turning to the most important tourism destinations, Table 1.11 classifies the top 10 countries of the EU-27 area according to the total number of nights spent by resident and non-resident tourists in each country in 2000 and 2006. The ranking is based on the data for 2006. Compared with 2000, positions one to nine did not change but Sweden joined the top 10, overtaking the Czech Republic.

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The market share of the top 10 in all nights spent in the EU-27 decreased slightly from 87.2% in 2000 to 86.8% in 2006. Five countries showed slight increases (Germany, with 1.3 percentage points, recorded the highest value, followed by Spain, Austria, Sweden and Italy) while five countries registered small decreases (the United Kingdom, with -1.6 percentage points, showing the biggest drop, followed by France, Greece, the Netherlands and Poland).

Table 1.12 - Top 10 destinations of international tourism in the EU-27, 2000 and 2006 (nights spent by non-residents)

Rank	Country	Nights spent by non-residents (1 000)		Average annual growth rate % 2000-2006	Market share (%)	
		2000	2006		2000	2006
	TOTAL EU-27	891 931	955 303	1.2	100.0	100.0
	Total top 10	783 900	819 385	0.7	87.9	85.8
1	ES	233 901	224 518	-0.7	26.2	23.5
2	IT	140 357	156 861	1.9	15.7	16.4
3	FR	109 664	105 865	-0.6	12.3	11.1
4	UK	73 816	90 741	3.5	8.3	9.5
5	AT	64 469	70 017	1.4	7.2	7.3
7	DE	42 420	52 947	3.8	4.8	5.5
6	EL	47 024	43 055	-1.5	5.3	4.5
8	NL	25 955	26 887	0.6	2.9	2.8
9	PT	25 785	26 842	0.7	2.9	2.8
10	IE	20 509	21 652	0.9	2.3	2.3

Table 1.12 shows the top 10 countries of the EU-27 area according to the number of nights spent by non-residents in 2000 and 2006. The ranking is based, as for Table 1.11, on the data for 2006.

In 2006, the ten leading tourism destinations accounted for 819.4 million nights spent by non-residents in the EU-27 (85.8% of all nights spent by non-residents in EU-27), as against 783.9 million in 2000 (87.9%), an average annual growth rate of +0.7%. Spain was still the most popular destination in the EU-27 area in 2006, with 224.5 million nights, but its market share showed a decline in comparison to 2000 (23.5% in 2006 versus 26.2% in 2000). Italy ranked second, with 155.9 million nights (+1.9% on average over the period) and a share of 16.4% in the EU-27. France held third place with 105.9 million nights (11.1%), as against 109.7 million in 2000 (12.3%), a slight decrease of -0.6% on average each year. In 2006, the United Kingdom was fourth with 90.7 million inbound nights, increasing its market share compared to 2000 (from 8.3% to 9.5%), also owing to an average annual increase in inbound nights in the previous six years (+3.5%).

Austria ranked fifth with 70.0 million nights (64.5 million in 2000, +1.4% on average each year) and a market share of 7.3%. The other top 10 countries were Germany (52.9 million international nights in 2006), followed by Greece (43.1 million), the Netherlands (26.9 million), Portugal (26.8 million) and Ireland (21.7 million). Among the last group, the best results were recorded for Germany, where nights spent by non-residents increased by +3.8% on average each year. In contrast, Greece showed a decrease in international nights from 2000 to 2006 (-1.5% on average each year) and consequently a reduction in its market share over the period analysed (from 5.3% to 4.5%).

Looking at international tourism receipts (Table 1.13), the ranking changes slightly. In terms of percentage share, the top 10 destinations are also somewhat less dominant: their share of receipts is below their share of nights, accounting in 2006 for about 82.9% of total receipts in the EU-27 (versus 85.7% in 2000). This decline in market share is mirrored by growth in international receipts in other EU countries.

Table 1.13 - Top 10 tourism earners in the EU-27, 2000 and 2006 (tourism receipts, excluding transport)

Rank	Country	International tourism receipts (EUR million)		Average annual growth rate % 2000-2006	Market share (%)	
		2000	2006		2000	2006
	TOTAL EU-27	217 106	254 203	2.7	100.0	100.0
	Total top 10	186 115	210 631	2.1	85.7	82.9
1	ES	36 377	40 710	1.9	16.8	16.0
2	FR	32 833	36 905	2.0	15.1	14.5
3	IT	28 625	30 281	0.9	13.2	11.9
4	UK	22 742	26 883	2.8	10.5	10.6
5	DE	22 243	26 091	2.7	10.2	10.3
6	AT	12 327	13 267	1.2	5.7	5.2
7	EL ¹	10 348	11 037	1.3	4.8	4.3
8	NL	8 307	9 172	1.7	3.8	3.6
9	BE ²	7 318	9 034	5.4	3.4	3.6
11	SE	4 995	7 251	6.4	2.3	2.9

1) 2005 data used for 2006, average annual growth rate 2000-2005. 2) 2002 data used for 2000, average annual growth rate 2002-2006.

Spain ranked first, with about EUR 40.7 bn, as against EUR 36.4 bn in 2000 (+1.9% annual average growth rate). Its market share, however, declined slightly over the same period (from 16.8% to 16.0%). It lies ahead of France, where receipts grew from EUR 32.8 to EUR 36.9 bn, an increase of +2.0% on average each year. Comparing the results for international tourism receipts, on the one hand, with nights spent in collective accommodation, on the other, shows that the volume of receipts is also influenced to a certain extent by the development of cross-border

same-day trips and nights in private accommodation and by the increase in prices in the destination country.

Although Italy came second in terms of international nights, it only ranked third in receipts (EUR 30.3 bn in 2006 versus EUR 28.6 bn in 2000, +0.9% on average each year), with a market share of 11.9% in 2006 (13.2% in 2000). This means that Italy recorded lower receipts per night in collective accommodation than France, or registered more cross-border same-day trips or nights in private accommodation. For the United Kingdom, receipts continued to increase (from EUR 22.7 bn to EUR 26.9 bn, +2.8% on average each year), although at a lower rate than international tourism nights. This shows that international tourists who chose to go there spent less in 2006 than in 2000. However, it should be remembered that inflation and, in the case of non-euro-zone countries, exchange rates may influence the absolute values of tourism receipts. The same trend applies to Germany and Austria.

On the other hand, in Greece and the Netherlands international tourism receipts rose compared to overnight stays. In Greece, for example, international receipts grew by +1.3% each year (2000-2005 data), while nights declined by -1.5% on average over the same period. This means that international tourists who chose to go there either spent more in 2005 than in 2000, or the number of same-day trips increased between 2000 and 2005. The same applies for the Netherlands.

As for Belgium and Sweden, they are among the top 10 countries for international tourism receipts, but not for the number of nights spent by non-residents. This means that these countries recorded a higher average receipt per night in comparison to other countries. In Belgium, this trend may be explained by the prevalence of business tourism.

1.2 Key drivers

The evolution of international tourism discussed in the previous section is affected by a number of factors whose impact is in some cases difficult to understand merely by looking at the statistical data on nights spent, tourism income and expenditure. In recent years, the extreme volatility of the international socio-economic and political scene and a number of significant events in many countries have had a major impact on tourists' decisions regarding holidays.

In this section, a summary is given of the most important positive and negative factors that have shaped the development of international tourism in Europe since 2004. These factors are grouped into five main categories:

- Political factors
- Economic factors
- Social, health and weather factors

- Market and accessibility factors
- Technology factors

Besides cyclical trends, it is also worth looking at a number of structural factors that influence the demand for tourism in the medium and long term.

In 2006, the population in the EU-27 amounted to almost 493 million people, corresponding to about 114.7 inhabitants per km². 79% of this population were living in EU-15 countries, where the ratio is 120.5 people per km² (Table 1.14).

Table 1.14 - Population and area in the EU-27, 2006

	Population	Area ¹	Inhabitants per
	(1 000)	(km ²)	km ²
EU-27	492 975	4 299 342	114.7
EU-15	389 555	3 231 776	120.5

1) 2004 data for UK and 2005 data for BE and BG.

The demographic trend in Europe is characterised by a steady growth in the number of elderly people (65 years and over), who will account for more than a fifth of the total population in 2020 (16.5% in the EU-25 area in 2005 - Eurostat Yearbook 2006-2007), and by an increase in singles and young couples without children. Elderly tourists of today are normally more interested in travel than past generations of the same age. They are usually more active and have money and time available for travel, including off-season. This not only implies a propensity to spend longer periods at tourism destinations that they consider provide pleasant living conditions ("residential tourism"), but also a higher holiday frequency per year. This partly applies also to singles and "empty nesters", i.e. couples whose children have left home. Although their travel decisions are affected by working time, they can plan their holidays more freely during the year than families who depend on school holidays.

Comparing different European sub-regions, the new Member States have a younger population than the "old" Member States. In 2005, residents up to 24 years of age accounted for about 32% of the total population on average, as against 28% in EU-15 area (Eurostat Yearbook, 2006-2007). Although the new Member States are basically destinations of tourism flows, the effect of the population structure will probably be seen in the travel behaviour of these countries in the not too distant future.

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Political factors

Policy and security issues continue to be relevant for the evolution of tourism flows and travel behaviour. In 2004 and 2005, the persistence of conflicts in the Middle East, the spread of terrorism in Egypt, Asia (Istanbul, Indonesia, etc.) and Europe and particularly the attacks on the countries involved in the war in Iraq (Madrid, 2004; London, 2005) contributed to an ongoing high degree of uncertainty and tension. The perception of risk influenced travel decisions to a significant extent. Intra-regional tourism (i.e. within Europe) continued to play a considerable role in comparison to inter-regional tourism (to and from Europe). In 2006, the failed terrorist attack at Heathrow airport in August and the bomb that exploded at Madrid airport in December resulted in stricter safety and security controls in airports. However, experience shows that in recent years the impact of these events on travel tends to be limited and short-lived. Travellers seem to have developed a sort of "immunity" to such threats.

Looking at the European continent, the enlargement of the European Union in 2004 to include ten new countries (the Czech Republic, Estonia, Cyprus, Latvia, Lithuania, Hungary, Malta, Poland, Slovenia and Slovakia) gave new impetus to tourism to and from these areas. The future will see increased cross-border trade and cooperation between the new and "old" Member States and the further development of intra-regional tourism. The new enlargement with Bulgaria and Romania at the beginning of 2007 and accession negotiations currently under way with other countries (Croatia, the former Yugoslav Republic of Macedonia and Turkey) should support this trend.

Migration and visa controls also continue to be impediments to travel growth in Europe, in particular between eastern countries (e.g. Russia and Poland) and from Russia to central/western European countries (e.g. Italy). The abolition or easing of visa requirements, reducing the length of bureaucratic procedures and high associated costs, would have a positive impact on travel demand, without necessarily generating increased security risks.

Another aspect to be taken into account is the regional "devolution" (i.e. decentralisation) in both "old" and new Member States (e.g. Italy, Portugal, Greece, Czech Republic, etc.), with the transfer of power from central to local government in, for example, the tourism sector. Although decentralisation has allowed regions within countries to develop their own tourism plans, it has also increased the fragmentation of roles and duties and led to a lack of coordination in key areas such as communication, marketing and promotion. The main consequence is the somewhat mixed promotion of the country's image as a tourism destination and often a duplication or overlap of initiatives at regional level, which can have the effect of puzzling potential tourists.

Economic factors

In the last three years of the period under review, the evolution of economic markets was characterised by a "two-speed Europe". In particular, in 2004 and 2005 the persisting weak economic situation in the euro area had a dampening effect on expenditure on tourism, for example, and changed the consumption behaviour of western Europeans. The recession in Germany and the stagnation in other neighbouring economies (e.g. Italy and France) persisted into 2005. An improvement in the economic trends in these countries was recorded in 2006.

On the other hand, in 2004 and 2005 the emerging European countries enjoyed their strongest growth since the beginning of the transition phase. This expansion was led by the Baltic States (Estonia, Latvia and Lithuania) and southern/south-eastern Europe (Bulgaria, Cyprus, Malta and Romania). As regards the Baltic States, even if their per capita GDP is still relatively low compared to that of western Europe, some economists predict that these countries could overtake most of eastern Europe and raise the living standards of their citizens in the coming decade. This will also lead to an expansion in outbound tourism, which is currently driven by visits to friends and relatives within the same area of Europe.

Table 1.15 - Recent trends in GDP in the EU-27, in total and by area, 2000 to 2006

GDP (EUR billion) (at current prices)	2000	2001	2002	2003	2004	2005	2006
EU-27	9 171.7	9 550.1	9 907.6	10 073.1	10 572.0	11 008.3	11 602.2
EU-15	8 733.9	9 058.2	9 383.7	9 549.6	9 999.8	10 343.6	10 857.4
Annual change rate % (at constant prices)	2000	2001	2002	2003	2004	2005	2006
EU-27		1.9	1.1	1.2	2.4	1.7	3.0
EU-15		1.9	1.0	1.0	2.2	1.6	2.8
Market share % (at current prices)	2000	2001	2002	2003	2004	2005	2006
EU-27	100.0	100.0	100.0	100.0	100.0	100.0	100.0
EU-15	95.2	94.8	94.7	94.8	94.6	94.0	93.6

Looking at the figures, GDP at current prices rose in the EU-27 from about EUR 9 172 bn in 2000 to EUR 11 602 bn in 2006 (annual average change of +4.0% - Table 1.15). The largest proportion of GDP is concentrated in the "old" Member States, where it increased from EUR 8 734 bn to 10 857 bn over the same period (+3.7% on average each year). The higher dynamics of GDP in the EU-27 in comparison to the EU-15 is explained by the better economic performance of the new Member States. Consequently, the share of EU-15 GDP in the EU-27 total declined slightly, from 95.2% in 2000 to 93.6% in 2006.

In real terms (i.e. corrected for inflation effects), GDP in the EU-27 rose on average by +1.9% per year from 2000 to 2006. This data hid a steady growth throughout the period, with a peak of +3.0% in 2006. As stated above, the rapid increases in 2004, 2005 and 2006 (+2.4%, +1.7% and +3.0% respectively) are mainly the result of the strong expansion in the new Member States (+5.5%, +4.7% and +6.2% in those same years).

The steady GDP growth in 2006 compared to 2005, together with the improvement of consumer and business confidence in industrialised countries, had positive effects

on the local labour markets (Table 1.16). The number of people employed in the EU-27 area grew by +2.0% in 2006, against +1.8% in 2005. Looking at the period as a whole, employment in the EU-27 showed an average annual increase of +1.0% between 2000 and 2006, led by the EU-15 countries (+1.3% on average each year), which accounted for 80.0% of all people employed in Europe (78.6% in 2000). However, 2006 revealed a change in the trend. For the first time since the beginning of the 21st century, the number of people employed in the EU-27 grew at a higher rate than people employed in EU-15 countries, highlighting the more dynamic growth in employment in the new Member States (+2.7%).

Exchange rates (US\$/Euro British Pound/Euro and Yen/Euro) have also influenced tourism flows within Europe. Euro-zone countries have lost comparative advantages to other parts of the world as tourism destinations for tourists coming from the USA, due to the continuous appreciation of the euro. Similarly, the strength of the euro against the yen increased in 2006, making euro-zone destinations less attractive for Japanese tourists.

Table 1.16 - Recent trends in employment in the EU-27, in total and by area, 2000 to 2006

Employment (1 000)	2000	2001	2002	2003	2004	2005	2006
EU-27 ¹	201 871	204 161	204 213	205 289	205 957	209 740	213 848
EU-15 ¹	158 759	161 408	162 737	164 156	164 814	168 089	171 044
Annual change rate %	2000	2001	2002	2003	2004	2005	2006
EU-27		1.1	0.0	0.5	0.3	1.8	2.0
EU-15		1.7	0.8	0.9	0.4	2.0	1.8
Market share %	2000	2001	2002	2003	2004	2005	2006
EU-27	100.0	100.0	100.0	100.0	100.0	100.0	100.0
EU-15	78.6	79.1	79.7	80.0	80.0	80.1	80.0

1) First quarter data is used for FR from 2000 to 2002.

Social, health and weather factors

Although market globalisation has reduced the physical and psychological distance between North and South, East and West, it has also led to the strong defence of local identities and values (ethnic, religious, cultural, etc.) against foreign influence. Ethnic conflicts have arisen in many parts of the world (e.g. Africa, Asia, etc.) and also in Europe (Chechnya in Russia).

The development of multiculturalism has thus gone hand in hand with the growth of radicalism, and this phenomenon is expected to intensify in some parts of the world in the near future.

The main effects are:

- A change in the geography of tourism: some destinations (especially in Africa) have been excluded from international tourism routes, and this has generally

benefited other destinations with the same climatic conditions but considered safer (e.g. southern Europe).

- At destinations, relations between tourists and residents have sometimes been hard to manage, because of the adverse reaction of the local community to people perceived as "invaders" and not as guests of the country.

In addition, the growth of clandestine migration from developing countries to developed economies that are also important tourism destinations (e.g. Italy) has also influenced how the local tourism market has evolved.

Another aspect that has emerged increasingly in Europe in recent years is “tourism for all”. This means that disabled people also participate frequently in tourism activities. Their access to means of transport, attractions and other facilities (accommodation establishments, beaches, etc.) has considerably improved. In the year 2000, official statistics showed that the proportion of people who are registered as severely disabled was estimated at 9% of the total EU population (33.8 million people). However, the overall number of disabled people is much higher (about 25% - European Commission, 2004). Some studies have demonstrated that the number of trips per person that could be made by disabled people who are financially and physically able to travel would be the same as for the average population. This highlights the importance of adapting tourism supply and services in such a way that nobody is excluded from enjoying them.

Apart from political and economic events, health aspects have also had profound effects on the tourism market in recent years, highlighting the importance of safety issues in the choice of travel destination. After the SARS in 2003, the outbreak of avian flu at the end of 2004/beginning of 2005 in Asia (Indonesia, Korea, Thailand, China, etc.) and then its spread to poultry and wild birds in the Russian Federation, Turkey, Romania and other East European and North African countries, tended to discourage tourism towards these areas. In addition, the unfounded fears that there might be a human flu pandemic in 2006 initially affected tourism mobility all over the world. Much has been done at international level (e.g. World Health Organisation, United Nations, World Tourism Organisation, European Commission, etc.) to inform consumers and stakeholders of the importance of being prepared and facing up to the situation in a measured and rational way, thus minimising the disruption to travel and tourism.

As for weather conditions, the tsunami disaster in South and South-East Asia (particularly in Sri Lanka, Maldives, Thailand and Indonesia) on 26 December 2004 caused a dramatic loss of human lives and a downturn of tourism in these areas. However, it had only a limited impact on global tourism, because the market share of the destinations concerned is low (according to WTO, about 3% of total world tourism arrivals in 2004) and the damages were limited to a few coastal resorts in each country. Furthermore, a substitution effect took place. In the very short term, some of the tourists who had intended to spend their holidays in those countries switched their travel plans to other destinations with similar characteristics.

At the end of 2005, beginning of 2006, the hurricanes over the Caribbean islands and Mexico caused a decline in inbound tourism flows coming generally from North America and Europe, with substitution effects on other destinations. In addition, in 2006 strange weather patterns characterised by flooding in northern European countries and dry weather and forest fires in the Mediterranean area caused a slowdown in intra-regional tourism.

Market and accessibility factors

As regards market and accessibility factors, cyclical elements combine with structural changes. The former include the attractiveness of major sport and cultural events in Europe, which mainly affected trends in both intra-European and international tourism demand. Even if past experience has shown that these events often have the opposite impact in terms of arrivals, they usually contribute to excellent results in terms of tourism receipts in the host countries and in some cases stimulate growth in tourism flows in the following years. For example, Greece and Portugal, which both failed to maximise the expected growth potential of the 2004 Summer Olympic Games and the UEFA European Football Championship, capitalised on post-event media exposure in 2005 and 2006 with a significant increase of international arrivals.

In contrast, Germany’s hosting of the FIFA World Football Championship in 2006 brought a significant growth in the numbers of international arrivals. In the Netherlands, the anniversary celebrations of the birth of Rembrandt supported the country’s excellent performance, while, in Austria, Vienna and Salzburg performed better than average because of the anniversary celebrations of the birth of Mozart, which partly compensated for the wet summer season and a winter season with a lack of snow. Austria’s presidency of the European Union also brought additional business traffic.

Looking at structural changes, although economic trends and the consequent growth, or reduction, in the purchasing power of European households have altered their travel behaviour, the changes in population demographics (ageing of the population, smaller households, more singles and childless couples, etc.), values (searching for something different, looking for new experiences, etc.) and lifestyles (flexible work hours, higher incomes and more free time, more short breaks, healthy living, etc.) have helped to develop a new kind of tourist, more experienced and demanding, flexible and independent-minded. New holiday patterns are emerging, forcing public and private tourism operators to develop new tourism products and services and to rethink their marketing and promotional strategies.

In detail:

- More holiday trips, but shorter stays;
- Growing interest in last-minute travel and low-cost offers;
- Growth in independent travel at the expense of package tours;
- Search for direct, unfiltered and more “conscious” contact with nature and the environment;
- Desire to gain a real and authentic experience of places;
- Interest in adventure, unexplored places or tourism “off the beaten track”;

- Development of “proximity” tourism, i.e. tourism to destinations/areas close to the usual place of residence (weekend trips);
- Development of new cultural horizons (living culture), that go beyond merely visiting museums and monuments or, more generally a single attraction, to include all the territory and the cultural context where the attraction is located (e.g. food, traditions, way of life, etc.);
- Interest in local customs, folklore and resources (e.g. craftworks, etc.).

The increase in travel frequency and shorter stays has also been stimulated by the spread of low-cost airline travel, which has been identified as one of the main drivers of tourism growth in Europe in 2006 (European Travel Commission, *European Tourism Insights 2006*, ETC Market Intelligence Report No 3/2007, May). The improvement in international air transport with new economic options (low-cost carriers) has forced competition not only between airline companies but also between different modes of short- or medium-haul transport (e.g. air and rail, air and car).

In addition, the emergence of low-cost carriers has opened new routes from and to secondary airports away from the main hubs used by traditional air carriers and has been a major factor in determining the success of new cities/resorts in popular destinations (e.g. Seville) and of new countries in central and eastern Europe (e.g. Latvia and Lithuania). This has expanded the potential traveller market by bringing air travel closer to where people live.

Apart from providing new travel opportunities to regular travellers (e.g. extending the market of short breaks), low-cost airlines have also created an additional tourism demand, attracting new groups of travellers residing outside the main metropolitan or urban areas, with limited budgets but with a healthy appetite for travel. An interesting example is given by the United Kingdom, where the number of low-cost flights from Bournemouth, Bristol, Doncaster, Liverpool, Glasgow, etc., is increasing in comparison to the London metropolitan area.

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

In 2005, concerns over climate change started to gain increasing attention, following the European Union Greenhouse Gas Emission Trading Scheme (EU ETS), which started operating in January. The “Scheme” resulted in a set of measures to stem excessive energy demand, including

higher taxes and carbon offset programmes. Each Member State was expected to define a National Allocation Plan in accordance with its Kyoto targets. In addition, in the same year an EU Communication on the impact of aviation on climate change highlighted that emissions from international flights from EU airports will increase by 150% between 1990 and 2012. This growth in EU international aviation emissions would eat into more than a quarter of the Community’s reductions target.

In 2006, the EU ETS was amended to include “Aviation”. This has a significant impact on tourism. According to the impact assessment, around 25% of tourist trips in the EU-27 (total) involve air travel (EU integration seen through statistics - Key facts of 18 policy areas, EUROSTAT 2006). Extra costs stemming from inclusion of the sector in the EU ETS would amount to some 2% of the average expenditure on a typical holiday trip by air in Europe, assuming a high allowance price of €30. Only for regions whose tourism receipts depend almost completely on inbound air travel can a somewhat greater impact be expected (the share of air travel on total tourism arrivals will be over 37% in Malta, Cyprus, Latvia, Greece, Spain, Portugal by 2020 according to the same impact assessment). The impact assessment also underlines that experience from past oil price shocks indicates that an increase corresponding to a high allowance price of €30 is unlikely to have a significant impact on international tourism demand.

Technology factors

The development of the internet and e-commerce, the convergence between information and communication technologies (ICT) and multimedia, the spread of mobile technologies (GSM, UMTS, etc.) and navigation systems (GPS) and more recently the emergence of social networking and Web 2.0, are all factors that have a strong impact on consumers’ travel decisions and thus on destination competitiveness.

On the demand side, the Internet allows potential tourists to search for information more quickly, to pick up data from different information sources (e.g. destinations, online travel agencies, hotels, etc.), to compare different travel solutions through meta-search engines and, where e-commerce facilities are provided, to book and purchase travel online. Customers can “call the shots” themselves and search for the best deal or last-minute booking or tailor their own package tour programme through dynamic packaging.

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1 According to the latest web statistics (Internet World Statistics, 2007), in Europe about 348.1 million people (43.4% of the entire population) surf the Internet, with travel and tourism services among the most popular products on the web. Although the highest penetration rates continue to be recorded in Scandinavia and Northern Europe (e.g. Norway 88%, Sweden 77%, the United Kingdom 67%), a dynamic evolution is sweeping through new Member States such as Estonia (58%) and Slovenia (62%), which are basically destinations of international tourism flows. In 2006, online travel sales in Europe accounted for about 16.1% of the total market (EUR 39.7 bn), an increase of +31% in comparison to 2005, when its share was 12.9% (EUR 30.2 bn - Carl H. Marcussen, 2008).

In addition, the democratisation of technology and the recent spread of Travel 2.0 applications support the sharing of travel experiences and the spread of electronic word of mouth. It can increasingly affect the choice of destination and especially of the services purchased ("where to stay") by "high tech" tourists.

On the supply side, the spread of ICT has increased opportunities for all tourism destinations and businesses to reach a larger market of potential clients but, at the same time, it has expanded global competition. The Internet offers tourism destinations and businesses (hotels, airlines, cruise companies, etc.) a new channel for making information and booking facilities available to large numbers of customers at relatively low cost compared to other distribution channels (e.g. front office/call centre, travel intermediary, etc.). On the one hand, this has led to market "disintermediation", with many businesses (especially low-cost airlines) bypassing travel agents and selling directly to customers. On the other hand, however, the Internet has stimulated the emergence of new online intermediaries (e.g. Travelocity.com, Expedia.com, etc.) on the market, competing with traditional travel agencies.

Many destinations around the world have adopted Destination Management Systems (DMS) to organise and promote their tourism offers. However, despite the millions of euros spent, these systems are still underutilised. Only destinations that can take full advantage of the opportunities will be able to capitalise on the benefits in the future.



CHAPTER 2 - TOURIST ACCOMMODATION

2. TOURIST ACCOMMODATION

This chapter gives an overview of the characteristics and evolution of the accommodation capacity in Europe by comparing the trends in the EU-27 area as a whole and in the old and new Member States and Candidate countries.

Table 2.1 shows the volume and evolution of the total number of collective accommodation establishments and bed places in all European countries in 2000 and 2006.

In 2006, the EU-27 countries reported 422 434 establishments and 27.4 million bed places, an average of 65 bed places per establishment. Looking at the evolution between 2000 and 2006, both the number of collective accommodation establishments (+1.7% on annual average) and the number bed places (+2.0% on annual average) increased. This also resulted in a small increase in the average size of establishments (from 64 in 2000 to 65 in 2006).

Table 2.1 - Accommodation capacity in collective accommodation establishments in Europe, 2000 and 2006

2000	EU-27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	IT	CY	LV	LT	LU	HU	MT	
Number of establishments	381 719	3 633	836	7 469	1 095	55 583	350	7 931	8 692	21 746	28 743	117 219	618	232	494	606	2 965	249	
Number of bed places (1 000)	24 221	633	136	437	383	3 079	16	197	703	2 622	5 416	3 910	88	17	27	65	313	41	
Bed places per establishment	63	174	163	59	350	55	47	25	81	121	188	33	143	74	55	107	105	164	
Share of individual countries on the EU-27 total																			
Number of establishments	100.0	1.0	0.2	2.0	0.3	14.6	0.1	2.1	2.3	5.7	7.5	30.7	0.2	0.1	0.1	0.2	0.8	0.1	
Number of bed places	100.0	2.6	0.6	1.8	1.6	12.7	0.1	0.8	2.9	10.8	22.4	16.1	0.4	0.1	0.1	0.3	1.3	0.2	
2006	EU-27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	IT	CY	LV	LT	LU	HU	MT	
Number of establishments	422 434	3 485	1 844	7 616	1 076	54 793	951	9 101	9 444	36 199	28 778	134 713	894	393	515	536	3 056	179	
Number of bed places (1 000)	27 351	368	247	442	391	3 331	41	209	787	3 075	5 737	4 500	94	25	32	66	315	40	
Bed places per establishment	65	106	134	58	364	61	43	23	83	85	199	33	105	62	62	124	103	225	
Share of individual countries on the EU-27 total																			
Number of establishments	100.0	0.8	0.4	1.8	0.3	13.0	0.2	2.2	2.2	8.6	6.8	31.9	0.2	0.1	0.1	0.1	0.7	0.0	
Number of bed places	100.0	1.3	0.9	1.6	1.4	12.2	0.1	0.8	2.9	11.2	21.0	16.5	0.3	0.1	0.1	0.2	1.2	0.1	
Average annual growth rate % 2000-2006																			
Number of establishments	1.7	-0.7	14.1	0.3	-0.3	-0.2	18.1	2.3	1.4	8.9	0.0	2.3	6.3	9.2	0.7	-2.0	0.5	-5.4	
Number of bed places	2.0	-8.6	10.5	0.2	0.3	1.3	16.6	1.0	1.9	2.7	1.0	2.4	1.0	6.2	2.8	0.4	0.1	-0.3	
2000	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	HR	MK ¹	TR	IS	LI	NO	CH		
Number of establishments	6 444	21 082	7 818	2 049	3 121	846	1 559	1 528	3 491	75 320	1 221	321	:	648	:	2 379	99 809		
Number of bed places (1 000)	1 139	930	652	485	280	64	143	223	634	1 588	485	42	:	:	:	501	1 071		
Bed places per establishment	177	44	83	237	90	76	92	146	182	21	397	132	:	:	:	211	11		
Share of individual countries on the EU-27 total																			
Number of establishments	1.7	5.5	2.0	0.5	0.8	0.2	0.4	0.4	0.9	19.7	0.3	0.1	:	0.2	:	0.6	26.1		
Number of bed places	4.7	3.8	2.7	2.0	1.2	0.3	0.6	0.9	2.6	6.6	2.0	0.2	:	:	:	2.1	4.4		
2006	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	HR	MK ¹	TR	IS	LI	NO	CH		
Number of establishments	7 154	20 457	6 694	2 324	4 710	707	2 043	1 381	4 008	79 383	1 643	:	:	595	157	2 282	:		
Number of bed places (1 000)	1 187	935	575	455	287	66	145	214	759	3 030	482	:	:	:	:	493	:		
Bed places per establishment	166	46	86	196	61	94	71	155	189	38	293	:	:	:	:	216	:		
Share of individual countries on the EU-27 total																			
Number of establishments	1.7	4.8	1.6	0.6	1.1	0.2	0.5	0.3	0.9	18.8	0.4	:	:	0.1	:	0.5	:		
Number of bed places	4.3	3.4	2.1	1.7	1.1	0.2	0.5	0.8	2.8	11.1	1.8	:	:	:	:	1.8	:		
Average annual growth rate % 2000-2006																			
Number of establishments	1.8	-0.5	-2.6	2.1	7.1	-2.9	4.6	-1.7	2.3	0.9	5.1	:	:	-1.4	:	-0.7	:		
Number of bed places	0.7	0.1	-2.1	-1.1	0.4	0.5	0.2	-0.7	3.0	11.4	-0.1	:	:	:	:	-0.3	:		

1) Provisional code which does not prejudice in any way the definitive nomenclature for this country, which will be agreed following the conclusion of negotiations currently taking place on this subject at the United Nations.

TOURIST ACCOMMODATION

In 2006, about 80% of all collective accommodation establishments in the EU-27 were concentrated in five countries. Italy ranked first (134 713 establishments, 31.9% of the EU-27 total), followed by the United Kingdom (79 383 establishments, 18.8%), Germany (54 793 establishments, 13.0%), Spain (36 199 establishments, 8.6%) and France (28 778 establishments, 6.8%).

Looking at accommodation capacity measured by bed places, it was France that occupied first place (about 5.7 million, 21.0% of the EU-27 total), followed by Italy (about 4.5 million, 16.5%), Germany (about 3.3 million, 12.2%), Spain (about 3.1 million, 11.2%) and the United Kingdom (about 3.0 million, 11.1%). Between 2000 and 2006, the share of these five countries rose from 78.2% to 79.0% in terms of establishments and from 68.6% to 71.9% in terms of bed places.

Regarding the dynamics of total accommodation supply, the "old" Member States with the highest increases in total collective accommodation establishments over the period analysed were Spain and Sweden (+8.9% and +2.3% on average each year, respectively), while for bed places it was the United Kingdom and Sweden (+11.4% and +3.0% respectively). The new Member States were headed by Estonia, Bulgaria and Latvia, in terms of both establishments (+18.1%, +14.1% and +9.2% respectively) and bed places (+16.6%, +10.5% and +6.2% respectively). By contrast, Malta (-5.4% on annual average from 2000 to 2006), Slovenia (-2.9%), Poland (-2.6%),

Luxembourg (-2.0%), and Finland (-1.7%) recorded a significant decline in the number of collective accommodation establishments. As for bed places, the major decreases were recorded by Belgium (-8.6%), Poland (-2.1%) and Portugal (-1.1%).

Comparing the trend for establishments and bed places over the period from 2000 to 2006, the countries with the highest increases in the average number of bed places per establishment between 2000 and 2006 were Malta (from 164 to 225 bed places), Slovenia (from 76 to 94), Luxembourg (from 107 to 124), the United Kingdom (from 21 to 37), Denmark (from 350 to 364) and France (from 188 to 199). Countries showing large decreases in the average size of total establishments, on the other hand, were Belgium (from 174 to 106), Portugal (from 237 to 196), Cyprus (from 143 to 105), Spain (from 121 to 85), Romania (from 90 to 61), Bulgaria (from 163 to 134), Slovakia (from 92 to 71), Latvia (from 74 to 62) and the Netherlands (from 177 to 166). However, the Candidate country Croatia showed the largest decrease in bed places per establishment (from 397 to 293 bed places). In all EU-27 countries, the average size of all accommodation establishments increased slightly between 2000 and 2006 from 63 to 65 bed places.

Table 2.2 presents the distribution of accommodation supply in each European country by category (hotels and other collective accommodation) and how it changed between 2000 and 2006.

Table 2.2 - Distribution of accommodation capacity, bed places, 2000 and 2006 (%)

2000	EU-27	BE	BG	CZ	DK	DE	EE ¹	IE	EL	ES	FR	IT	CY	LV	LT	LU	HU	MT
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Hotels and similar establishments	42.8	18.8	89.1	49.8	16.4	51.6	100.0	70.5	86.4	50.2	22.4	47.4	95.6	69.2	42.4	22.3	45.9	99.8
Other collect. accomm.	57.2	81.2	10.9	50.2	83.6	48.4	:	29.5	13.6	49.8	77.6	52.6	4.4	30.8	57.6	77.7	54.1	0.2
of which: tourist campsites ²	68.2	68.4	28.4	11.0	83.8	52.5	:	58.4	100.0	56.6	85.4	63.9	79.5	13.2	5.8	91.7	60.7	:
of which: holiday dwellings ³	18.3	12.0	:	12.3	12.5	21.3	:	19.5	:	43.4	14.2	22.8	20.5	81.1	89.7	3.8	11.8	:
2006	EU-27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	IT	CY	LV	LT	LU	HU	MT
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Hotels and similar establishments	42.2	33.7	85.6	53.4	18.1	49.0	63.8	71.0	88.1	52.5	21.9	46.4	95.5	80.4	67.4	21.6	50.4	98.3
Other collect. accomm.	57.8	66.3	14.4	46.6	81.9	51.0	36.2	29.0	11.9	47.5	78.1	53.6	4.5	19.6	32.6	78.4	49.6	1.7
of which: tourist campsites ⁴	64.3	40.1	12.7	15.1	83.8	47.2	29.7	42.2	100.0	53.0	82.7	56.3	66.7	31.3	8.7	92.7	55.0	:
of which: holiday dwellings ⁵	20.3	20.1	38.9	13.6	12.3	19.2	23.6	37.7	:	39.4	16.9	25.1	33.3	37.5	79.8	4.2	14.4	:
2000	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	HR	MK ⁶	TR	IS	LI	NO	CH	
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	:	:	:	100.0	100.0	
Hotels and similar establishments	15.2	63.3	18.5	46.0	71.2	47.5	30.6	52.6	29.7	70.5	41.1	37.8	:	:	:	28.1	24.2	
Other collect. accomm.	84.8	36.7	81.5	54.0	28.8	52.5	69.4	47.4	70.3	29.5	58.9	62.2	:	:	:	71.9	75.8	
of which: tourist campsites	75.2	57.4	13.5	96.2	35.8	53.8	57.4	88.5	85.0	58.8	73.6	44.5	:	:	:	97.0	25.9	
of which: holiday dwellings	18.9	15.9	5.9	:	:	8.0	6.1	8.9	11.2	15.2	6.2	:	:	:	:	1.7	44.4	
2006	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	HR	MK ⁶	TR	IS	LI	NO	CH	
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	:	:	:	:	100.0	:	
Hotels and similar establishments	16.2	61.2	31.0	58.0	78.8	47.0	40.1	55.3	26.5	41.4	33.9	:	:	:	:	30.7	:	
Other collect. accomm.	83.8	38.8	69.0	42.0	21.2	53.0	59.9	44.7	73.5	58.6	66.1	:	:	:	:	69.3	:	
of which: tourist campsites	72.7	54.3	6.3	95.2	44.4	47.4	46.2	85.6	84.8	67.3	66.9	:	:	:	:	94.3	:	
of which: holiday dwellings	21.6	19.7	5.6	:	:	12.3	7.5	12.6	8.3	21.4	3.1	:	:	:	:	4.0	:	

1) The category "Other collective accommodation" is included in "Hotels and similar establishments". 2) EU-27 excluding EE and MT 3) EU-27 excluding BG, EE, EL, MT, PT and RO. 4) EU-27 excluding MT. 5) EU-27 excluding EL, MT, PT and RO. 6) Provisional code which does not prejudice in any way the definitive nomenclature for this country, which will be agreed following the conclusion of negotiations currently taking place on this subject at the United Nations.

In 2006, about 42% of the total EU-27 capacity was in hotels and about 58% in other accommodation establishments (of which 64.9% were campsites and 20.3% holiday dwellings). The six-year period saw a slight decrease in the share of hotels and similar establishments (from 42.8% of total bed places in 2000 to 42.2% in 2006), compared with a small increase in other collective establishments (from 57.2% to 57.8%). In particular, the weight of campsite bed places in total bed places in non-hotel accommodation declined from 68.2% in 2000 to 64.9% in 2006, while in holiday dwellings it rose from 18.3% to 20.3%.

In 2006, the countries with the highest percentages of bed places in hotels and similar establishments were: Malta (98.3% versus 99.8% in 2000), Cyprus (95.6% versus 95.5%), Bulgaria (85.6% versus 89.1%), Greece (88.1% versus 86.4%), Latvia (80.4% versus 69.2%), Romania (78.8% versus 71.2%), Ireland (71.0% versus 70.5%) and Lithuania (67.4% versus 42.4%). In 2006, figures above 55.0% were also recorded in Estonia (63.8%), Austria (61.2%), Portugal (58.0%), and Finland (55.3%).

Looking at other collective accommodation establishments, the highest shares of bed places in 2006 in this category were registered in the Benelux region (the Netherlands with 83.8%, Luxembourg 78.4%, Belgium 66.3%), Scandinavia (Denmark 81.9%, Sweden 73.5% and Norway 69.3%), France (78.1%) and in certain eastern European countries (Poland 69.0%, Croatia 66.1% and Slovakia 59.9%).

The comparison between 2000 and 2006 showed a strong decline in the weight of other accommodation establishments in Lithuania (from 57.6% to 32.6%), Belgium (from 81.2% to 66.3%), Poland (from 81.5% to 69.0%), Portugal (from 54.0% to 42.0%), Slovakia (from 69.4% to 59.9%), Romania (from 28.8% to 21.2%), Hungary (from 54.1% to 49.6%), the Czech Republic (from 50.2% to 46.6%) and a significant increase in Croatia (from 58.9% to 66.1%) and Bulgaria (from 10.9% to 14.4%).

Focusing on the most important destinations of international tourism in Europe, Spain and Greece saw an increase in bed places in hotels and similar establishments between 2000 and 2006 (from 50.2% to 52.5% and from 86.4% to 88.1% respectively). The reverse trend was recorded in Italy, the share of bed places in hotels dropping from 47.4% to 46.4% over the period analysed, due to the growth in bed places in other collective accommodation establishments, especially in holiday dwellings (from 22.8% to 25.1%).

However, the greatest changes in accommodation supply were recorded by Belgium, Sweden and the United Kingdom. In Belgium, the weight of bed places in hotels showed a sharp increase in the six-year period, from 18.8% to 33.7%. On the other hand, bed places in hotels in Sweden and the United Kingdom decreased over the same period (from 29.7% to 26.5% and from 70.5% to 41.4% respectively). Almost all eastern European countries increased their hotel capacity from 2000 to 2006, especially Slovakia (from 30.6% to 40.1%), Latvia (from 69.2% to 80.4%) and Lithuania (from 42.4% to 67.4%). The only exception was Croatia, which recorded a decrease from 41.1% to 33.9% over the same period.

TOURIST ACCOMMODATION

Looking at the accommodation capacity in hotels and similar establishments (Table 2.3), in 2006 about 72% was concentrated in five countries. Taking into account the number of hotels, the United Kingdom ranked first (39 107 hotels, 19.5% of the EU-27 total), followed by Germany (36 201 hotels, 18.0%), Italy (33 768 hotels, 16.8%), Spain (18 304 hotels, 9.1%) and France (18 135 hotels, 9.0%).

In terms of bed places, it was Italy that occupied first place (2.1 million bed places in 2006, 18.1%), followed by Germany (1.6 million, 14.1%), Spain (1.6 million, 14.0%), the United Kingdom (1.3 million, 10.9%) and France (1.3 million, 10.9%).

Table 2.3 - Accommodation capacity in hotels and similar establishments in Europe, 2000 and 2006

2000	EU-27	BE	BG	CZ	DK	DE	EE ¹	IE	EL	ES	FR	IT	CY	LV	LT	LU	HU	MT	
Number of hotels	205 451	1 998	648	3 960	472	38 551	350	5 449	8 342	16 287	18 773	33 361	583	166	227	315	1 928	246	
Number of bed places in hotels (1 000)	10 367	119	121	218	63	1 590	16	139	608	1 316	1 214	1 854	85	12	12	14	144	41	
Bed places per hotel	50	60	187	55	133	41	47	25	73	81	65	56	145	72	51	46	74	166	
Share of individual countries on the EU-27 total																			
Number of hotels	100.0	1.0	0.3	1.9	0.2	18.8	0.2	2.7	4.1	7.9	9.1	16.2	0.3	0.1	0.1	0.2	0.9	0.1	
Number of bed places in hotels	100.0	1.1	1.2	2.1	0.6	15.3	0.2	1.3	5.9	12.7	11.7	17.9	0.8	0.1	0.1	0.1	1.4	0.4	
2006	EU-27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	IT	CY	LV	LT	LU	HU	MT	
Number of hotels	200 949	1 955	1 348	4 314	473	36 201	341	4 296	9 111	18 304	18 135	33 768	753	321	338	284	2 032	173	
Number of bed places in hotels (1 000)	11 537	124	212	236	71	1 632	26	148	693	1 615	1 254	2 087	90	20	22	14	159	40	
Bed places per hotel	57	63	157	55	150	45	76	34	76	88	69	62	119	61	64	51	78	228	
Share of individual countries on the EU-27 total																			
Number of hotels	100.0	1.0	0.7	2.1	0.2	18.0	0.2	2.1	4.5	9.1	9.0	16.8	0.4	0.2	0.2	0.1	1.0	0.1	
Number of bed places in hotels	100.0	1.1	1.8	2.0	0.6	14.1	0.2	1.3	6.0	14.0	10.9	18.1	0.8	0.2	0.2	0.1	1.4	0.3	
Average annual growth rate % 2000-2006																			
Number of hotels	-0.4	-0.4	13.0	1.4	0.0	-1.0	-0.4	-3.9	1.5	2.0	-0.6	0.2	4.4	11.6	6.9	-1.7	0.9	-5.7	
Number of bed places in hotels (1 000)	1.8	0.6	9.7	1.4	2.0	0.4	8.2	1.1	2.2	3.5	0.5	2.0	1.0	8.8	11.0	-0.1	1.7	-0.5	
2000	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	HR	MK ²	TR	IS	LI	NO	CH		
Number of hotels	2 835	15 517	1 449	1 786	2 533	448	582	1 011	1 906	45 728	733	145	1 814	244	50	1 166	5 754		
Number of bed places in hotels (1 000)	173	588	120	223	199	31	44	117	188	1 119	200	16	322	13	1	141	260		
Bed places per hotel	61	38	83	125	79	68	75	116	99	24	272	110	178	51	24	121	45		
Share of individual countries on the EU-27 total																			
Number of hotels	1.4	7.6	0.7	0.9	1.2	0.2	0.3	0.5	0.9	22.3	0.4	0.1	0.9	0.1	0.0	0.6	2.8		
Number of bed places in hotels	1.7	5.7	1.2	2.2	1.9	0.3	0.4	1.1	1.8	10.8	1.9	0.2	3.1	0.1	0.0	1.4	2.5		
2006	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	HR	MK ²	TR	IS	LI	NO	CH		
Number of hotels	3 099	14 051	2 301	2 028	4 125	358	922	923	1 888	39 107	762	:	:	308	46	1 119	:		
Number of bed places in hotels (1 000)	192	573	178	264	226	31	58	118	201	1 256	163	:	:	17	1	151	:		
Bed places per hotel	62	41	77	130	55	87	63	128	107	32	214	:	:	55	28	135	:		
Share of individual countries on the EU-27 total																			
Number of hotels	1.5	7.0	1.1	1.0	2.1	0.2	0.5	0.5	0.9	19.5	0.4	:	:	0.2	0.0	0.6	:		
Number of bed places in hotels	1.7	5.0	1.5	2.3	2.0	0.3	0.5	1.0	1.7	10.9	1.4	:	:	0.1	0.0	1.3	:		
Average annual growth rate % 2000-2006																			
Number of hotels	1.5	-1.6	8.0	2.1	8.5	-3.7	8.0	-1.5	-0.2	-2.6	0.6	:	:	4.0	-1.4	-0.7	:		
Number of bed places in hotels	1.8	-0.4	6.8	2.9	2.1	0.3	4.8	0.1	1.1	1.9	-3.3	:	:	5.1	1.3	1.2	:		

1) Includes the category "Other collective accommodation establishments". 2) Provisional code which does not prejudice in any way the definitive nomenclature for this country, which will be agreed following the conclusion of negotiations currently taking place on this subject at the United Nations.

Regarding the dynamics of hotel accommodation supply between 2000 and 2006, the "old" Member States with the highest increases in both establishments and bed places over the period analysed were Spain and Greece (for hotels: +2.0% and +1.5% on average each year, respectively; for bed places: +3.5% and +2.2% respectively). The new Member States were headed by Bulgaria, Latvia, Romania, Poland, Slovakia and Lithuania, in terms of both establishments (+13.0%, +11.6%, +8.5%, +8.0%, +8.0% and +6.9% respectively) and bed places (+9.7%, +8.8%, +2.1%, +6.8%, +4.8% and

+11.0% respectively). In contrast, the countries that recorded a decline in the number of hotels were Malta (-5.7% on average each year), Ireland (-3.9%) Slovenia (-3.7%), the United Kingdom (-2.6%), Luxembourg (-1.7%), Austria (-1.6%) and Finland (-1.5%). As for bed places, the highest decrease of all reporting European countries was recorded by Croatia (-3.4%).

The average size of hotels and similar establishments in all EU-27 countries increased in the reporting period. In 2000, the average number of bed places in hotels amounted to 50 while in 2006 it was 57. The countries recording the highest increases in the average number of bed places per hotel between 2000 and 2006 were Malta (from 166 to 228 bed places), Estonia (from 47 to 77), Slovenia (from 68 to 87), Norway (from 121 to 135), Lithuania (from 51 to 64), Finland (from 116 to 128), Ireland (from 25 to 34), Sweden (from 99 to 107), the United Kingdom (from 24 to 32) and Spain (from 81 to 88). At the other end of the scale, the countries recording decreases in the average size of hotels were Croatia (from 272 to 214 bed places), Bulgaria (from 187 to 157), Cyprus (from 145 to 119), Romania (from 79 to 55), Slovakia (from 75 to 63), Latvia (from 72 to 61) and Poland (from 83 to 77). In the Czech Republic the average size of hotels was stable (55 bed places).

Table 2.4 shows the average gross annual occupancy (or utilisation) rates of hotels and other collective accommodation in each European country in 2000 and 2006. This rate is based on the number of bed places available over the whole or at least part of the year (including seasonal closures) compared with the number of nights spent by tourists (residents and non-residents) in the same period. It is influenced by the different tourism characteristics of each country.

For a given number of bed places, therefore, the more nights spent, the higher the occupancy rate. In addition, in countries where hotels account for the majority of the local tourism capacity (e.g. Cyprus, Malta, etc.), their occupancy rates are generally higher than for hotels in other countries.

In 2006, the gross annual occupancy rate in hotels and similar establishments in the EU-27 was 36.2% (37.8% in 2000). The countries showing the highest gross annual utilisation of hotels were Malta (50.6%), Ireland (49.6% versus 47.8% in 2000), Slovenia (45.3% versus 41.3%), Spain (45.3% versus 47.3%), Cyprus (43.9% versus 56.4%) and Portugal (39.0% versus 41.5%). On the other hand, values well below the average were recorded in Bulgaria (20.9%), Romania (21.9%), Greece (22.4%), Liechtenstein (24.9%), Luxembourg (26.1%) and Hungary (27.3%).

Countries with the highest increases in gross annual occupancy rates between 2000 and 2006 were Estonia with +10.7%, Croatia with +9.9%, Lithuania with +9.4%, Latvia with +4.9% and Slovenia with +4.0%. On the other hand, countries with the largest decreases were Cyprus (-12.5%), the United Kingdom (-10.6%), Liechtenstein (-5.5%) and Greece (-5.0%).

Taking into account the monthly utilisation of bed places in hotels in 2006 (Table 2.5), the summer months generally showed the highest hotel utilisation of the year, because Europeans are used to spending their holidays during this period.

Table 2.4 - Gross annual occupancy rate in hotels and similar establishments, 2000 and 2006 (%)

	2000	2006
EU-27 ¹	37.8	36.2
BE	32.7	34.0
BG	18.4	20.9
CZ	32.2	30.0
DK	40.1	41.2
DE	34.1	35.0
EE ²	28.8	39.5
IE	47.8	49.6
EL	27.4	22.4
ES	47.3	45.3
FR	43.1	43.1
IT	34.5	32.6
CY	56.4	43.9
LV	31.3	36.2
LT	21.0	30.4
LU	24.0	26.1
HU	25.8	27.3
MT	:	50.6
NL	47.0	45.3
AT	33.4	37.0
PL	32.6	33.6
PT	41.5	39.0
RO	21.9	21.9
SI	41.3	45.3
SK	35.1	33.3
FI	31.2	34.8
SE	30.9	33.0
UK	47.0	36.4
HR	24.8	34.7
MK ³	15.1	:
TR	38.0	:
IS	26.0	28.2
LI	30.4	24.9
NO	31.9	32.2
CH	35.8	:

Note: This table is calculated using the following formula: (total nights/(total bedplaces*365))*100.

1) Excludes MT. 2) For 2000, the category "Other collective accommodation" is included. 3) Provisional code which does not prejudice in any way the definitive nomenclature for this country, which will be agreed following the conclusion of negotiations currently taking place on this subject at the United Nations.

However, some distinctions need to be made. In countries where beach tourism dominates (Greece, Cyprus and Malta), the hotel occupancy rate records a peak between June and September, particularly in July and August. On the other hand, in countries where city tourism, cultural tourism, business tourism, etc. (e.g. France, the United Kingdom, Benelux, Germany, Switzerland, etc.) have an important share in the entire tourism market, gross utilisation is more distributed over the year, with peaks from April/May to September/October, which were in general lower than in beach tourism countries.

TOURIST ACCOMMODATION

Table 2.5 - Gross utilisation of bed places in hotels, 2006 (%)

	January	February	March	April	May	June	July	August	September	October	November	December
EU-27	:	:	:	:	:	:	:	:	:	:	:	:
BE	22.6	28.9	29.4	37.1	37.7	38.3	39.3	40.4	39.6	36.5	32.6	31.3
BG	20.9	20.9	20.9	28.6	28.6	28.6	45.7	45.7	45.7	13.7	13.7	13.7
CZ	26.2	30.9	30.1	33.9	36.2	36.1	38.9	42.9	38.1	35.3	26.8	25.3
DK	25.0	28.0	33.0	36.0	45.0	52.0	66.0	61.0	51.0	43.0	41.0	29.0
DE	23.1	26.6	27.5	31.8	38.0	39.6	39.7	41.9	44.9	38.5	29.0	27.0
EE	24.0	28.0	34.0	38.0	43.0	51.0	63.0	57.0	44.0	40.0	36.0	33.0
IE ¹	31.0	39.0	40.0	49.0	46.0	52.0	57.0	62.0	53.0	46.0	39.0	38.0
EL	25.2	28.9	32.5	32.6	49.8	68.2	83.0	89.9	73.4	44.3	30.8	31.1
ES	24.0	28.9	32.7	43.7	47.4	57.0	65.4	72.3	60.6	46.9	29.3	25.7
FR	28.7	34.3	36.0	44.8	45.4	51.4	55.7	59.3	51.2	41.5	32.8	32.3
IT ²	18.9	21.8	25.5	25.0	30.6	44.6	55.3	62.7	42.0	26.5	15.9	17.1
CY	14.3	16.3	22.6	35.6	51.5	65.0	72.8	83.4	66.2	57.2	23.7	14.2
LV	23.5	23.8	25.0	30.0	37.3	40.6	51.1	59.5	36.4	35.7	33.0	31.3
LT	18.9	21.2	24.3	28.7	34.0	43.1	45.8	46.2	37.7	30.1	24.9	25.9
LU	18.1	21.3	23.8	28.3	32.6	32.6	32.5	33.4	33.7	30.4	27.9	20.3
HU	7.1	7.8	9.7	13.0	15.0	19.0	27.0	28.0	17.0	13.0	9.3	8.4
MT	27.7	34.0	37.9	49.6	53.0	61.0	77.6	82.8	63.8	55.8	38.0	30.5
NL	29.1	33.9	37.0	50.2	50.7	52.0	52.7	56.8	53.8	48.4	41.9	36.5
AT	47.9	57.4	45.5	28.8	24.0	34.2	44.7	51.3	38.6	25.3	15.2	32.5
PL	26.0	28.5	31.0	32.8	39.4	42.7	41.6	44.6	44.2	38.6	32.1	27.3
PT	20.5	26.4	30.4	42.6	42.1	45.7	52.7	66.7	51.5	40.2	26.7	24.1
RO ¹	21.2	28.4	29.1	26.5	30.7	32.7	44.6	49.9	35.8	35.1	34.6	24.4
SI	35.4	34.3	39.0	39.8	45.4	53.9	61.9	70.0	56.8	46.1	35.8	35.6
SK	32.7	38.7	32.3	28.2	33.7	37.4	42.0	45.6	38.8	32.3	25.7	23.2
FI	30.5	36.8	38.9	33.9	30.5	38.5	49.5	40.7	38.5	34.5	34.1	31.1
SE	23.1	28.2	30.6	29.7	33.5	34.2	48.9	43.6	36.3	32.3	31.9	23.7
UK	27.0	34.0	35.0	45.0	46.0	51.0	58.0	61.0	56.0	47.0	40.0	39.0
HR	14.0	19.8	20.4	31.5	40.5	66.5	86.0	88.7	63.4	28.6	17.4	14.9
MK ³	:	:	:	:	:	:	:	:	:	:	:	:
TR	:	:	:	:	:	:	:	:	:	:	:	:
IS ¹	15.6	22.8	25.8	28.3	34.5	47.1	67.3	60.1	39.7	32.8	25.5	18.3
LI	27.8	31.4	28.7	20.1	22.6	24.8	29.9	27.8	25.8	21.4	20.2	18.5
NO	23.4	30.6	31.9	26.1	26.4	41.2	52.4	46.4	34.3	27.6	28.0	20.2
CH ⁴	31.5	39.0	36.9	27.1	25.5	34.4	42.5	46.5	38.1	27.8	17.8	:

1) Net utilisation. 2) 2005 data. 3) Provisional code which does not prejudice in any way the definitive nomenclature for this country, which will be agreed following the conclusion of negotiations currently taking place on this subject at the United Nations. 4) 2003 data.

Austria has double seasonality in that it combines cultural tourism with mountain tourism and winter sports. Its gross utilisation has two peaks, one in summer (July/August) and one in winter (January to March). Italy's hotels are also a special case. They have a lower gross monthly utilisation rate than other countries offering similar tourism products (e.g. France), with a peak in July and August. This is probably due to the high fragmentation of the local hotel supply, which is mainly concentrated in seasonal destinations (e.g. beach resorts, mountain resorts, spa resorts, etc.) where establishments are only open for some months of the year (from 90 to 180 days).

Looking at eastern and northern European countries, gross utilisation also depends on climatic conditions. In other words, although cultural and city tourism is the main motivation for trips to these countries, the majority of tourists prefer to visit them during periods with mild

temperatures. For example, Poland and Estonia recorded a peak from May to July/September, Finland, Sweden and Norway (no 2006 data available yet) from June to September.

Table 2.6 presents the number and evolution of nights spent in hotels and other accommodation establishments in almost all European countries in 2000 and 2006.

In 2006, about 66% of total nights in the EU-27 were spent in hotels (1.3 bn) and about 34% in other accommodation establishments (about 780 million), including 15.5% in campsites and 8.6% in holiday dwellings. The six-year period saw only a small increase in the share of nights spent in hotels. In the group of other collective accommodation, there was a slight increase in the share of nights spent in campsites (from 14.9% in 2000 to 15.5% in 2006) at the expense of holiday dwellings (from 9.4% to 8.6%).

Table 2.6 - Nights spent in European countries, 2000 and 2006 (1 000)

2000	EU-27	BE	BG	CZ	DK	DE	EE ¹	IE	EL	ES	FR	IT	CY	LV	LT	LU	HU	MT	
Total ²	2 145 657	29 215	8 554	44 199	25 165	298 488	1 712	29 657	62 186	344 664	284 646	338 885	17 419	1 484	1 406	2 596	20 430	:	
Hotels and similar estab. ²	1 430 563	14 229	8 140	25 574	9 200	198 070	1 712	24 160	60 840	227 144	191 073	233 613	17 388	1 360	882	1 263	13 541	:	
Other collect. accomm. ³	715 094	14 986	414	18 625	15 965	100 418	:	5 497	1 346	117 520	93 573	105 272	31	124	524	1 333	6 889	:	
- Tourist campsites ⁴	320 637	3 699	209	3 232	10 798	21 037	:	2 414	1 346	28 108	93 573	61 478	:	22	19	1 041	2 173	:	
- Holiday dwellings ⁵	200 718	6 746	:	879	4 073	30 018	:	:	:	89 412	:	28 486	:	90	459	140	950	:	
% distribution of total																			
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	:
Hotels and similar estab.	66.7	48.7	95.2	57.9	36.6	66.4	100.0	81.5	97.8	65.9	67.1	68.9	99.8	91.6	62.7	48.7	66.3	:	
Other collect. accomm. ⁶	33.3	51.3	4.8	42.1	63.4	33.6	:	18.5	2.2	34.1	32.9	31.1	0.2	8.4	37.3	51.3	33.7	:	
- Tourist campsites	14.9	12.7	2.4	7.3	42.9	7.0	:	8.1	2.2	8.2	32.9	18.1	:	1.5	1.4	40.1	10.6	:	
- Holiday dwellings	9.4	23.1	:	2.0	16.2	10.1	:	:	:	25.9	:	8.4	:	6.1	32.6	5.4	4.7	:	
2006	EU-27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	IT	CY	LV	LT	LU	HU	MT	
Total	2 304 499	29 371	17 355	41 448	27 267	351 224	4 543	33 655	57 797	379 276	297 482	366 764	14 438	3 114	2 936	2 611	19 652	7 407	
Hotels and similar estab.	1 524 990	15 371	16 118	25 889	10 647	208 176	3 761	26 812	56 708	267 028	197 420	248 255	14 341	2 600	2 385	1 361	15 808	7 290	
Other collect. accomm.	779 509	14 000	1 237	15 559	16 620	143 048	782	6 843	1 089	112 248	100 062	118 509	97	514	551	1 250	3 844	117	
- Tourist campsites ²	356 564	3 141	101	3 239	11 698	21 546	234	2 676	1 089	31 879	100 062	62 997	17	182	65	972	1 456	:	
- Holiday dwellings ⁷	197 074	5 123	514	939	3 686	29 264	119	:	:	72 931	:	32 906	81	89	395	110	932	:	
% distribution of total																			
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Hotels and similar estab.	66.2	52.3	92.9	62.5	39.0	59.3	82.8	79.7	98.1	70.4	66.4	67.7	99.3	83.5	81.2	52.1	80.4	98.4	
Other collect. accomm.	33.8	47.7	7.1	37.5	61.0	40.7	17.2	20.3	1.9	29.6	33.6	32.3	0.7	16.5	18.8	47.9	19.6	1.6	
- Tourist campsites	15.5	10.7	0.6	7.8	42.9	6.1	5.2	8.0	1.9	8.4	33.6	17.2	0.1	5.8	2.2	37.2	7.4	:	
- Holiday dwellings	8.6	17.4	3.0	2.3	13.5	8.3	2.6	:	:	19.2	:	9.0	0.6	2.9	13.5	4.2	4.7	:	
Average annual growth rate % 2000-2006																			
Total	1.2	0.1	12.5	-1.1	1.3	2.7	17.7	2.1	-1.2	1.6	0.7	1.3	-3.1	13.1	13.1	0.1	-0.6	:	
Hotels and similar estab.	1.1	1.3	12.1	0.2	2.5	0.8	14.0	1.8	-1.2	2.7	0.5	1.0	-3.2	11.4	18.0	1.3	2.6	:	
Other collect. accomm.	1.4	-1.1	20.0	-3.0	0.7	6.1	:	3.7	-3.5	-0.8	1.1	2.0	20.9	26.7	0.8	-1.1	-9.3	:	
- Tourist campsites	1.8	-2.7	-11.4	0.0	1.3	0.4	:	1.7	-3.5	2.1	1.1	0.4	:	42.2	22.8	-1.1	-6.5	:	
- Holiday dwellings	-0.3	-4.5	:	1.1	-1.7	-0.4	:	:	:	-3.3	:	2.4	:	-0.2	-2.5	-3.9	-0.3	:	
2000	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	HR	MK ⁸	TR	IS	LI	NO	CH		
Total	81 263	90 711	48 794	41 956	17 647	6 509	10 464	16 042	39 809	281 756	30 858	1 420	:	1 736	186	24 271	68 777		
Hotels and similar estab.	29 722	71 649	14 297	33 795	15 947	4 618	5 604	13 347	21 264	192 131	18 074	882	44 728	1 186	133	16 365	33 928		
Other collect. accomm.	51 541	19 062	34 497	8 161	1 700	1 891	4 860	2 695	18 545	89 625	12 784	538	:	550	53	7 906	34 849		
- Tourist campsites	19 628	4 603	1 164	6 970	267	954	495	2 122	13 951	41 334	10 740	148	258	326	:	7 148	7 128		
- Holiday dwellings	28 202	5 277	1 379	:	:	390	301	453	3 463	:	815	:	7 911	46	30	401	18 825		
% distribution of total																			
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	:	100.0	100.0	100.0	100.0		
Hotels and similar estab.	36.6	79.0	29.3	80.5	90.4	70.9	53.6	83.2	53.4	68.2	58.6	62.1	:	68.3	71.5	67.4	49.3		
Other collect. accomm.	63.4	21.0	70.7	19.5	9.6	29.1	46.4	16.8	46.6	31.8	41.4	37.9	:	31.7	28.5	32.6	50.7		
- Tourist campsites	24.2	5.1	2.4	16.6	1.5	14.7	4.7	13.2	35.0	14.7	34.8	10.4	:	18.8	:	29.5	10.4		
- Holiday dwellings	34.7	5.8	2.8	:	:	6.0	2.9	2.8	8.7	:	2.6	:	:	2.6	16.1	1.7	27.4		
2006	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	HR	MK ⁸	TR	IS	LI	NO	CH		
Total	83 943	98 130	51 235	45 521	18 992	7 448	11 012	18 168	47 697	266 013	37 345	:	:	2 411	170	27 489	:		
Hotels and similar estab.	31 759	77 391	21 820	37 566	18 098	5 147	7 054	15 014	24 210	166 961	20 693	:	:	1 728	118	17 755	:		
Other collect. accomm.	52 184	20 739	29 415	7 955	894	2 301	3 958	3 154	23 487	99 052	16 652	:	:	683	52	9 734	:		
- Tourist campsites	21 251	4 669	672	6 832	224	1 054	412	2 257	17 542	60 297	12 634	:	:	402	15	8 120	:		
- Holiday dwellings	26 813	6 582	925	:	:	579	359	756	3 391	10 580	573	:	:	83	24	1 267	:		
% distribution of total																			
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	:	:	100.0	100.0	100.0	:		
Hotels and similar estab.	37.8	78.9	42.6	82.5	95.3	69.1	64.1	82.6	50.8	62.8	55.4	:	:	71.7	69.4	64.6	:		
Other collect. accomm.	62.2	21.1	57.4	17.5	4.7	30.9	32.9	17.4	49.2	37.2	44.6	:	:	28.3	30.6	35.4	:		
- Tourist campsites	25.3	4.8	1.3	15.0	1.2	14.2	3.7	12.4	36.8	22.7	33.8	:	:	16.7	8.8	29.5	:		
- Holiday dwellings	31.9	6.7	1.8	:	:	7.8	3.3	4.2	7.1	4.0	1.5	:	:	3.4	14.1	4.6	:		
Average annual growth rate % 2000-2006																			
Total	0.5	1.3	0.8	1.4	1.2	2.3	0.9	2.1	3.1	-1.0	3.2	:	:	5.6	-1.5	2.1	:		
Hotels and similar estab.	1.1	1.3	7.3	1.8	2.1	1.8	3.9	2.0	2.2	-2.3	2.3	:	:	6.5	-2.0	1.4	:		
Other collect. accomm.	0.2	1.4	-2.6	-0.4	-10.2	3.3	-3.4	2.7	4.0	1.7	4.5	:	:	3.7	-0.3	3.5	:		
- Tourist campsites	1.3	0.2	-8.7	-0.3	-2.9	1.7	-3.0	1.0	3.9	6.5	2.7	:	:	3.6	:	2.1	:		
- Holiday dwellings	-0.8	3.8	-6.4	:	:	6.8	3.0	8.9	-0.3	:	-5.7	:	:	10.3	-3.7	21.1	:		

1) The category "Other collective accommodation" is included in "Hotels and similar establishments". 2) EU-27 excluding MT. 3) EU-27 excluding EE and MT. 4) EU-27 excluding EE, CY and MT. 5) EU-27 excluding BG, EE, IE, FR, CY, MT, PT, RO and UK. 6) The share is calculated from the total. The category "Other collective accommodation n.e.c.", which is an additional subcategory of "Other collect. accomm.", is not shown due to its heterogeneous structure in the different countries. 7) EU-27 excluding IE, EL, FR, MT, PT and RO. 8) Provisional code which does not prejudice in any way the definitive nomenclature for this country, which will be agreed following the conclusion of negotiations currently taking place on this subject at the United Nations.

TOURIST ACCOMMODATION

The “old” Member States with the highest percentages of total nights spent in hotels in 2006 were Greece (56.7 million, 98.1% of total nights), Portugal (37.6 million, 82.5%), Ireland (26.8 million, 79.7%), Austria (77.4 million, 78.9%), Spain (267.0 million, 70.4%), Italy (248.3 million, 67.7%) and France (197.0 million, 66.4%).

In Ireland, Greece and Austria, much of this consists of a rather high concentration of accommodation supply in hotels, while in Spain, France, Italy and Portugal, the share of bed places in hotels was lower with 52.5%, 21.9%, 46.4% and 58.0% respectively (see Table 2.2). Comparing these figures with the share of nights in the same establishments (70.4%, 66.4%, 67.7% and 82.5% respectively) confirms that the utilisation of bed places in hotels in these countries (except France) was higher than that in other collective accommodation.

In other countries, e.g. Belgium, Sweden and Luxembourg, the share of nights spent in hotels and other accommodation establishments is more balanced. Regarding eastern Europe, the majority of nights spent in these countries are concentrated in hotels, which are the main form of local accommodation supply (see Table 2.2). The only exception is Poland, where 57.4% of total nights were spent in other accommodation establishments, which accounted for 69.0% of total accommodation supply.

The trend between 2000 and 2006 showed a small increase of nights spent in the EU-27 in both hotels and other collective accommodation (+1.1% and +1.4% on average each year). Looking at individual countries, eastern European countries are the ones where nights spent in hotels showed the highest increase over the period analysed (e.g. Lithuania +18.0% on average each year, Estonia +14.0%, Bulgaria +12.1% and Latvia +11.4%). On the contrary, Cyprus, the United Kingdom and Greece recorded the largest decreases of nights in hotels over the same period (-3.2%, -2.3% and -1.2% respectively).

As for other collective accommodation, the countries with the highest growth in nights spent in those establishments were Latvia (+26.7% on average each year), Cyprus (+20.9%), Bulgaria (+20.0%) and Germany (+6.1%). Romania (-10.2% on average each year), Hungary (-9.3%), Greece (-3.5%), Slovakia (-3.4%) and the Czech Republic (-3.0%) recorded the most significant decreases.



**CHAPTER 3 - THE TRAVEL PATTERNS
OF EUROPEAN TOURISTS**

3. THE TRAVEL PATTERNS OF EUROPEAN TOURISTS

This chapter describes the evolution of travel behaviour of European tourists by country of origin, both in general and in more detail, distinguishing between domestic tourism and outbound tourism. For some of the new Member States and for all Candidate countries, data availability is not yet sufficient for a detailed analysis.

Table 3.1 shows the total number of trips (domestic and outbound) made by all tourists (leisure and business) resident in EU-27 countries for both 2000 and 2006, broken down by short (1-3 nights) and long trips (4 nights and more).

Table 3.1 - Total trips (leisure and business) by length of stay, 2000 and 2006 (1 000)

2000	EU-27	BE ¹	BG	CZ	DK	DE	EE	IE ¹	EL	ES	FR	IT	CY	LV	LT	LU	HU	MT	
Total	: 9 759	:	:	: 10 025	142 694	:	: 7 603	6 880	123 144	163 758	77 336	:	:	:	: 994	:	:	:	
1-3 nights	: 3 549	:	:	: 5 600	30 203	:	: 4 002	1 858	93 818	85 913	38 042	:	:	:	: 371	:	:	:	
4 nights + more	: 6 210	:	:	: 4 425	112 491	:	: 3 601	5 022	29 326	77 845	39 294	:	:	:	: 623	:	:	:	
2006	EU-27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	IT	CY	LV	LT	LU	HU	MT	
Total	: 10 793	:	: 30 548	12 933	186 754	1 032	11 311	17 205	140 816	198 235	92 061	:	: 5 230	4 274	1 365	25 762	:	:	
1-3 nights	: 3 777	:	: 20 587	6 566	71 756	700	6 075	8 080	91 951	110 796	47 373	:	: 4 153	2 942	639	18 782	:	:	
4 nights + more	: 7 016	:	: 9 961	6 367	114 998	332	5 236	9 125	48 865	87 439	44 688	:	: 1 077	1 332	726	6 980	:	:	
Average annual growth rate % 2000-2006²																			
Total	: 2.0	:	:	: 4.3	4.6	:	: 8.3	16.5	2.3	3.2	2.9	:	:	:	: 5.4	:	:	:	
1-3 nights	: 1.3	:	:	: 2.7	15.5	:	: 8.7	27.8	-0.3	4.3	3.7	:	:	:	: 9.5	:	:	:	
4 nights + more	: 2.5	:	:	: 6.3	0.4	:	: 7.8	10.5	8.9	2.0	2.2	:	:	:	: 2.6	:	:	:	
% distribution 2006																			
Total	: 100.0	:	: 100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	:	: 100.0	100.0	100.0	100.0	:	:	
1-3 nights	: 35.0	:	: 67.4	50.8	38.4	67.8	53.7	47.0	65.3	55.9	51.5	:	: 79.4	68.8	46.8	72.9	:	:	
4 nights + more	: 65.0	:	: 32.6	49.2	61.6	32.2	46.3	53.0	34.7	44.1	48.5	:	: 20.6	31.2	53.2	27.1	:	:	
2000	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	HR	MK ³	TR	IS	LI	NO	CH		
Total	: 19 581	:	: 11 729	:	:	:	: 26 843	:	: 175 500	:	:	:	:	:	:	:	:		
1-3 nights	: 10 393	:	: 7 612	:	:	:	: 21 110	:	: 90 600	:	:	:	:	:	:	:	:		
4 nights + more	: 9 188	:	: 4 117	:	:	:	: 5 733	:	: 84 900	:	:	:	:	:	:	:	:		
2006	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	HR	MK ³	TR	IS	LI	NO	CH		
Total	: 20 360	44 411	11 757	7 210	5 424	9 076	32 341	:	: 141 118	:	:	:	:	:	:	: 21 988	:		
1-3 nights	: 10 616	23 700	7 215	3 707	3 456	3 899	25 033	:	: 74 563	:	:	:	:	:	:	: 14 235	:		
4 nights + more	: 9 744	20 711	4 542	3 503	1 968	5 177	7 308	:	: 66 555	:	:	:	:	:	:	: 7 753	:		
Average annual growth rate % 2000-2006																			
Total	: 0.7	:	: 0.0	:	:	:	: 3.2	:	: -3.6	:	:	:	:	:	:	:	:		
1-3 nights	: 0.4	:	: -0.9	:	:	:	: 2.9	:	: -3.2	:	:	:	:	:	:	:	:		
4 nights + more	: 1.0	:	: 1.7	:	:	:	: 4.1	:	: -4.0	:	:	:	:	:	:	:	:		
% distribution 2006																			
Total	: 100.0	100.0	100.0	100.0	100.0	100.0	100.0	:	: 100.0	:	:	:	:	:	:	: 100.0	:		
1-3 nights	: 52.1	53.4	61.4	51.4	63.7	43.0	77.4	:	: 52.8	:	:	:	:	:	:	: 64.7	:		
4 nights + more	: 47.9	46.6	38.6	48.6	36.3	57.0	22.6	:	: 47.2	:	:	:	:	:	:	: 35.3	:		

1) 2001 data. 2) Average annual growth rate 2001-2006 for BE and IE. 3) Provisional code which does not prejudice in any way the definitive nomenclature for this country, which will be agreed following the conclusion of negotiations currently taking place on this subject at the United Nations.

In most countries for which data are available, the majority of tourists opted for short trips (1-3 nights), a growing trend since 2000. In 2006, the proportion of short trips in the "old" Member States ranged from a low of 35.0% of total trips by Belgian tourists (2001 data) to a high of 77.4% for Finnish tourists. Including countries with a large population like Spain, France and Italy, more than 50.0% of total trips made by residents were for not more than 3 nights, with a peak of 65.3% for Spanish tourists.

A similar trend is reflected in new Member States for which data are available. In 2006, most tourist trips made by residents were short trips, with a share ranging from a low of 51.4% of total trips for Romanian tourists to a high of 79.4% for Latvian tourists. Slovakia was the only exception, recording a share of 43.0% of short trips in all trips.

THE TRAVEL PATTERNS OF EUROPEAN TOURISTS

Looking at the dynamics of 2000 to 2006, the increase in short trips was generally more pronounced than for long trips. Greece (+27.8% on average each year), Germany (+15.5%), Luxembourg (+9.5%), Ireland (+8.7%, 2001 to 2006 data) and France (+4.3%) recorded the highest growth rates for 1-3 night trips. On the other hand, a decrease was shown for trips made by residents in the United Kingdom (-3.2% on average each year), Portugal (-0.9%) and Spain (-0.3%). Long trips recorded good growth in Greece (+10.5% on average each year), Spain (+8.9%), Ireland (+7.8%, 2001 to 2006 data) and Denmark (+6.3%).

For Belgian, Danish, Austrian and Finnish tourists the number of long trips of 4 nights or more increased more in comparison to short trips (+2.5% versus +1.3% on average each year, +6.3% versus +2.7%, +1.0% versus 0.4%, +4.1% versus +2.9%, respectively). For Spanish and Portuguese tourists, 1-3 night trips decreased while trips of

4 and more nights increased (-0.3% versus +8.9% and -0.9% versus +1.7% respectively). The United Kingdom was the only country (of those for which data are available) to record a decline in both the number of long trips (-4.0%) and short trips (-3.2% on average per year).

As can be seen from the number of nights spent both at home and abroad by all tourists living in EU-27 countries (Table 3.2), the majority were spent on trips of 4 nights and more, with proportions ranging from 56.4% for Finns to 91.4% for Belgians. Rather high percentages (more than 80.0%) were also recorded for tourists coming from both the main tourism destinations (Greece 86.6%, Italy 85.4% and France 80.9%) and the main countries of origin of international tourism (e.g. Germany 90.4% and the United Kingdom 81.7%). In the new Member States, the share of nights spent on long trips ranged from a low of 57.9% for Latvian tourists to a high of 84.1% for Slovak tourists.

Table 3.2 - Total nights spent by tourists from European countries by length of stay, 2000 and 2006 (1 000)

2000	EU-27	BE ¹	BG	CZ	DK	DE	EE	IE ¹	EL	ES	FR	IT	CY	LV	LT	LU	HU	MT
Total	: 78 819	:	:	: 60 739	1 371 948	:	: 43 963	65 963	560 426	934 948	547 404	:	:	:	: 7 620	:	:	:
1-3 nights	: 7 108	:	:	: 12 293	70 831	:	: 8 034	3 993	176 337	157 942	69 697	:	:	:	: 739	:	:	:
4 nights + more	: 71 711	:	:	: 48 446	1 301 117	:	: 35 929	61 970	384 089	777 006	477 707	:	:	:	: 6 881	:	:	:
2006	EU-27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	IT	CY	LV	LT	LU	HU	MT
Total	: 88 875	:	: 122 779	69 988	1 326 827	3991	61 698	126 852	642 091	1 046 559	602 679	:	:	: 16 811	19 652	8 496	87 091	:
1-3 nights	: 7 613	:	: 39 206	13 381	127 730	1200	11 969	16 936	182 380	200 333	88 054	:	:	: 7 071	5 088	1 274	35 619	:
4 nights + more	: 81 262	:	: 83 573	56 607	1 199 097	2791	49 729	109 916	459 711	846 226	514 625	:	:	: 9 740	14 564	7 222	51 472	:
Average annual growth rate % 2000-2006 ²																		
Total	: 2.4	:	: 2.4	-0.6	: 7.0	11.5	2.3	1.9	1.6	:	:	:	:	: 1.8	:	:	:	:
1-3 nights	: 1.4	:	: 1.4	10.3	: 8.3	27.2	0.6	4.0	4.0	:	:	:	:	: 9.5	:	:	:	:
4 nights + more	: 2.5	:	: 2.6	-1.4	: 6.7	10.0	3.0	1.4	1.2	:	:	:	:	: 0.8	:	:	:	:
% distribution 2006																		
Total	: 100.0	:	: 100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	:	:	: 100.0	100.0	100.0	100.0	:
1-3 nights	: 8.6	:	: 31.9	19.1	9.6	30.1	19.4	13.4	28.4	19.1	14.6	:	:	: 42.1	25.9	15.0	40.9	:
4 nights + more	: 91.4	:	: 68.1	80.9	90.4	69.9	80.6	86.6	71.6	80.9	85.4	:	:	: 57.9	74.1	85.0	59.1	:
2000	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	HR	MK ³	TR	IS	LI	NO	CH	
Total	: 104 221	:	: 57 338	:	:	:	: 95 311	:	956 500	:	:	:	:	:	:	:	:	
1-3 nights	: 19 249	:	: 13 276	:	:	:	: 46 932	:	184 200	:	:	:	:	:	:	:	:	
4 nights + more	: 84 972	:	: 44 062	:	:	:	: 48 379	:	772 300	:	:	:	:	:	:	:	:	
2006	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	HR	MK ³	TR	IS	LI	NO	CH	
Total	: 105 191	264 638	61 948	39 954	22 657	50 471	100 724	:	774 446	:	:	:	:	:	:	: 61 255	:	
1-3 nights	: 20 678	43 357	12 735	7 766	6 477	8 001	43 961	:	141 412	:	:	:	:	:	:	: 20 120	:	
4 nights + more	: 84 513	221 281	49 213	32 188	16 180	42 470	56 763	:	633 034	:	:	:	:	:	:	: 41 135	:	
Average annual growth rate % 2000-2006																		
Total	: 0.2	: 1.3	:	:	:	:	: 0.9	:	-3.5	:	:	:	:	:	:	:	:	
1-3 nights	: 1.2	: -0.7	:	:	:	:	: -1.1	:	-4.3	:	:	:	:	:	:	:	:	
4 nights + more	: -0.1	: 1.9	:	:	:	:	: 2.7	:	-3.3	:	:	:	:	:	:	:	:	
% distribution 2006																		
Total	: 100.0	100.0	100.0	100.0	100.0	100.0	100.0	:	100.0	:	:	:	:	:	:	: 100.0	:	
1-3 nights	: 19.7	16.4	20.6	19.4	28.6	15.9	43.6	:	18.3	:	:	:	:	:	:	: 32.8	:	
4 nights + more	: 80.3	83.6	79.4	80.6	71.4	84.1	56.4	:	81.7	:	:	:	:	:	:	: 67.2	:	

1) 2001 data. 2) Average annual growth rate 2001-2006 for BE and IE. 3) Provisional code which does not prejudice in any way the definitive nomenclature for this country, which will be agreed following the conclusion of negotiations currently taking place on this subject at the United Nations.

In general, short trips showed stronger growth than long trips, also in terms of nights. This confirms the market trend towards shorter stays and an increase in the number of "multi-holidays". In particular, the total number of nights spent on such trips by tourists from countries where the growth in the number of 1-3 night trips was higher than that for trips of 4 nights or more (Germany, Ireland, Greece, France, Italy and Luxembourg) generally followed the same trend. For example, tourist trips of 1-3 nights made by residents in Germany (for leisure purposes only) rose by +15.5% on annual average between 2000 and 2006. Over the same period, the nights spent on such trips also increased by +10.3%. The same applies to Irish, Greek, French, Italian and Luxembourg tourists, although Italian and Luxembourg residents had slightly lower annual average increases. On the other hand, trips of 1-3 nights made by Finnish tourists increased by +2.9% on average, while nights spent on these trips declined by -1.1% over the same period, revealing a decrease in the average duration of such trips.

Table 3.3 shows the evolution of the average duration of trips by length of stay. Looking at European countries for which data are available, in 2006 the average duration of a trip (both domestic and outbound, for holiday and business purposes) covered a span from 3.1 nights for Finns to 8.2 nights for Belgian tourists. As mentioned above, this average value depends on the breakdown of total trips into 1-3 night trips and long trips made by residents in each country, in terms of both the number of trips and the nights spent. For example, short trips made by Finnish tourists made up about 77% of total trips but only around 44% of total nights. In Germany, 1-3 night trips made by residents accounted for only 38.4% of total trips and 9.6% of total nights.

Table 3.3 - Total trips by length of stay: average duration of trip, 2000 and 2006 (nights)

2000	EU-27	BE ¹	BG	CZ	DK	DE	EE	IE ¹	EL	ES	FR	IT	CY	LV	LT	LU	HU	MT
Total	:	8.1	:	:	6.1	9.6	:	5.8	9.6	4.6	5.7	7.1	:	:	:	7.7	:	:
1-3 nights	:	2.0	:	:	2.2	2.3	:	2.0	2.1	1.9	1.8	1.8	:	:	:	2.0	:	:
4 nights + more	:	11.5	:	:	10.9	11.6	:	10.0	12.3	13.1	10.0	12.2	:	:	:	11.0	:	:
2006	EU-27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	IT	CY	LV	LT	LU	HU	MT
Total	:	8.2	:	4.0	5.4	7.1	3.9	5.5	7.4	4.6	5.3	6.5	:	3.2	4.6	6.2	3.4	:
1-3 nights	:	2.0	:	1.9	2.0	1.8	1.7	2.0	2.1	2.0	1.8	1.9	:	1.7	1.7	2.0	1.9	:
4 nights + more	:	11.6	:	8.4	8.9	10.4	8.4	9.5	12.0	9.4	9.7	11.5	:	9.0	10.9	9.9	7.4	:
2000	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	HR	MK ²	TR	IS	LI	NO	CH	
Total	:	5.3	:	4.9	:	:	:	3.6	:	5.5	:	:	:	:	:	:	:	
1-3 nights	:	1.9	:	1.7	:	:	:	2.2	:	2.0	:	:	:	:	:	:	:	
4 nights + more	:	9.2	:	10.7	:	:	:	8.4	:	9.1	:	:	:	:	:	:	:	
2006	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	HR	MK ²	TR	IS	LI	NO	CH	
Total	:	5.2	6.0	5.3	5.5	4.2	5.6	3.1	:	5.5	:	:	:	:	:	2.8	:	
1-3 nights	:	1.9	1.8	1.8	2.1	1.9	2.1	1.8	:	1.9	:	:	:	:	:	1.4	:	
4 nights + more	:	8.7	10.7	10.8	9.2	8.2	8.2	7.8	:	9.5	:	:	:	:	:	5.3	:	

1) 2001 data. 2) Provisional code which does not prejudice in any way the definitive nomenclature for this country, which will be agreed following the conclusion of negotiations currently taking place on this subject at the United Nations.

Looking at 1-3 night trips, in 2006, their average length ranged from a minimum of 1.4 nights for Norwegian tourists to a maximum of 2.1 nights for Greek, Slovak and Romanian residents (leisure trips only). In the Baltic States, tourists spend about 1.7 nights on average on short trips. As for long trips (4 nights and more), the minimum recorded in the "old" Member States was 7.8 nights for Finnish tourists and the maximum 12.0 nights for Greeks (Table 3.3). In the new Member States, the range went from 7.4 nights for Hungarian tourists to 10.9 nights for Lithuanian tourists.

Comparing 2000 and 2006, 9 of the 13 "old" Member States for which data are available recorded a decrease in the duration of trips of 4 nights or more made by tourists

from those countries. This was particularly true of Spaniards (from 13.1 to 9.4 nights), Danes (from 10.9 to 8.9 nights), Germans (from 11.6 to 10.4 nights for leisure trips only), Italians (from 12.2 to 11.5 nights) and tourists from Luxembourg (from 11.0 to 9.9 nights). Only tourists from the United Kingdom slightly increased the duration of their long trips (from 9.1 to 9.5 nights), while Belgian and Portuguese tourists showed a stable trend. On the other hand, the average length of stay for trips of 1-3 nights remained stable from 2000 to 2006, except for German, Finnish, Danish and British tourists, for whom a slight decrease was recorded (from 2.3 to 1.8, from 2.2 to 1.8, from 2.2 to 2.0 and from 2.0 to 1.9 nights, respectively).

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Looking only at short trips (1-3 nights), Table 3.4 shows the distribution of these trips (domestic and outbound) for each country by the main purpose of the visit (leisure versus business). Travelling for leisure purposes was by far the main reason for tourists from all EU countries, accounting for a low of 47.8% of total 1-3 night trips for Slovak tourists to a high of 95.7% for Hungarian tourists. Values above

90.0% were also recorded in Romania (94.6%), France (93.1%), Latvia (91.3%) and Greece (90.4%). Business trips recorded relatively high shares for Slovaks (52.2% of total trips), Luxembourg tourists (34.4%), Austrians (33.8%), Germans (33.3%) and tourists from the United Kingdom (28.4%), Denmark (27.9%) and Norway (26.5%).

Table 3.4 - Trips of 1-3 nights: total trips by purpose, 2000 and 2006 (1 000)

2000	EU-27	BE ¹	BG	CZ	DK	DE	EE	IE ¹	EL	ES	FR	IT	CY	LV	LT	LU	HU	MT
Total	:	3 549	:	:	5 600	30 203	:	4 002	1 858	93 818	85 913	38 042	:	:	:	371	:	:
Leisure	:	2 766	:	:	3 502	22 326	:	3 137	1 606	92 492	81 421	29 063	:	:	:	248	:	:
Business	:	783	:	:	2 098	7 877	:	865	252	1 326	4 492	8 979	:	:	:	123	:	:
2006	EU-27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	IT	CY	LV	LT	LU	HU	MT
Total	:	3 777	:	20 587	6 566	71 756	700	6 075	8 080	91 951	110 796	47 373	:	4 153	2 942	639	18 782	:
Leisure	:	3 188	:	17 821	4 736	47 845	586	5 006	7 305	81 302	103 139	36 920	:	3 793	2 386	419	17 973	:
Business	:	589	:	2 766	1 830	23 911	114	1 069	775	10 649	7 657	10 453	:	360	556	220	809	:
Average annual growth rate % 2000-2006²																		
Total	:	1.3	:	:	2.7	15.5	:	8.7	27.8	-0.3	4.3	3.7	:	:	:	9.5	:	:
Leisure	:	2.9	:	:	5.2	13.5	:	9.8	28.7	-2.1	4.0	4.1	:	:	:	9.1	:	:
Business	:	-5.5	:	:	-2.3	20.3	:	4.3	20.6	41.5	9.3	2.6	:	:	:	10.2	:	:
% distribution 2006																		
Total	:	100.0	:	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	:	100.0	100.0	100.0	100.0	:
Leisure	:	84.4	:	86.6	72.1	66.7	83.7	82.4	90.4	88.4	93.1	77.9	:	91.3	81.1	65.6	95.7	:
Business	:	15.6	:	13.4	27.9	33.3	16.3	17.6	9.6	11.6	6.9	22.1	:	8.7	18.9	34.4	4.3	:
2000	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	HR	MK ³	TR	IS	LI	NO	CH	
Total	:	10 393	:	7 612	:	:	:	21 110	:	90 600	:	:	:	:	:	:	:	
Leisure	:	7 310	:	6 955	:	:	:	17 989	:	68 000	:	:	:	:	:	:	:	
Business	:	3 083	:	657	:	:	:	3 121	:	22 600	:	:	:	:	:	:	:	
2006	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	HR	MK ³	TR	IS	LI	NO	CH	
Total	:	10 616	23 700	7 215	3 707	3 456	3 899	25 033	:	74 563	:	:	:	:	:	14 235	:	
Leisure	:	7 026	20 508	6 423	3 505	2 958	1 865	21 510	:	53 375	:	:	:	:	:	10 465	:	
Business	:	3 590	3 192	792	202	498	2 034	3 523	:	21 188	:	:	:	:	:	3 770	:	
Average annual growth rate % 2000-2006																		
Total	:	0.4	:	-0.9	:	:	:	2.9	:	-3.2	:	:	:	:	:	:	:	
Leisure	:	-0.7	:	-1.3	:	:	:	3.0	:	-4.0	:	:	:	:	:	:	:	
Business	:	2.6	:	3.2	:	:	:	2.0	:	-1.1	:	:	:	:	:	:	:	
% distribution 2006																		
Total	:	100.0	100.0	100.0	100.0	100.0	100.0	100.0	:	100.0	:	:	:	:	:	100.0	:	
Leisure	:	66.2	86.5	89.0	94.6	85.6	47.8	85.9	:	71.6	:	:	:	:	:	73.5	:	
Business	:	33.8	13.5	11.0	5.4	14.4	52.2	14.1	:	28.4	:	:	:	:	:	26.5	:	

1) 2001 data. 2) Average annual growth rate 2001-2006 for BE and IE. 3) Provisional code which does not prejudice in any way the definitive nomenclature for this country, which will be agreed following the conclusion of negotiations currently taking place on this subject at the United Nations.

Looking at developments between 2000 and 2006, in general short trips for leisure purposes showed a higher increase than business trips for the Irish (+9.8% against +4.3% on average each year, 2001-2006 data), Greeks (+28.7% versus +20.6%), Italians (+4.1% versus +2.6%) and Finns (+3.0% versus +2.0%). On the other hand, short trips for business reasons increased more than leisure trips for German (+20.3% versus +13.5%), French (+9.3% versus +4.0%) and the Luxembourg tourists (+10.2% versus +9.1%). In Belgium and Denmark, leisure trips showed a steady increase and business trips a drop (+2.9%

versus -5.5% on annual average and +5.2% versus -2.3%, respectively). Conversely, Spain and Portugal recorded a growth in business trips and a decline in leisure trips (+41.5% versus -2.1% and +3.2% versus -1.3% respectively). The United Kingdom saw a decrease in both business and leisure trips (annual average of -4.0% and -1.1% respectively).

Analysing the distribution of nights spent on short trips by the main purpose of the visit (Table 3.5), most were spent on leisure trips, with the French accounting for the highest incidence of 93.9%. This confirms the trend already noted in Table 3.4. For tourists from other southern European countries, like Italy, Spain and Greece, the share of nights spent on leisure trips ranged from 81.0% to 90.7%. Percentages higher than 85.0% were also recorded in

Portugal (89.4%), Finland (87.6%), Belgium (86.5%) and in the new Member States (e.g. Hungary 96.0%, Romania 95.2%, Latvia 91.1%, Poland 89.4% and Slovenia 86.4%). On the other hand, the highest proportion of nights spent on business trips was recorded for Slovaks (46.8% of nights spent on short trips, Luxembourgers (30.8%), Austrians (29.1%), Germans (27.9%), tourists from the United Kingdom (25.4%) and Danes (23.6%).

Table 3.5 - Trips of 1-3 nights: total nights by purpose, 2000 and 2006 (1 000)

2000	EU-27	BE ¹	BG	CZ	DK	DE	EE	IE ¹	EL	ES	FR	IT	CY	LV	LT	LU	HU	MT	
Total	:	7 108	:	:	12 293	70 831	:	8 034	3 993	176 337	157 942	69 697	:	:	:	739	:	:	
Leisure	:	5 764	:	:	8 891	55 447	:	6 579	3 474	173 726	150 636	54 347	:	:	:	522	:	:	
Business	:	1 344	:	:	3 402	15 384	:	1 455	519	2 611	7 306	15 350	:	:	:	217	:	:	
2006	EU-27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	IT	CY	LV	LT	LU	HU	MT	
Total	:	7 613	:	39 206	13 381	127 730	1 200	11 969	16 936	182 380	200 333	88 054	:	7 071	5 088	1 274	35 619	:	
Leisure	:	6 586	:	34 797	10 226	92 120	998	10 194	15 355	161 445	188 055	71 358	:	6 440	4 094	881	34 210	:	
Business	:	1 027	:	4 409	3 155	35 610	202	1 775	1 581	20 935	12 278	16 696	:	631	994	393	1 409	:	
Average annual growth rate % 2000-2006 ²																			
Total	:	1.4	:	:	1.4	10.3	:	8.3	27.2	0.6	4.0	4.0	:	:	:	9.5	:	:	
Leisure	:	2.7	:	:	2.4	8.8	:	9.2	28.1	-1.2	3.8	4.6	:	:	:	9.1	:	:	
Business	:	-5.2	:	:	-1.2	15.0	:	4.1	20.4	41.5	9.0	1.4	:	:	:	10.4	:	:	
% distribution 2006																			
Total	:	100.0	:	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	:	100.0	100.0	100.0	100.0	:	
Leisure	:	86.5	:	88.8	76.4	72.1	83.2	85.2	90.7	88.5	93.9	81.0	:	91.1	80.5	69.2	96.0	:	
Business	:	13.5	:	11.2	23.6	27.9	16.8	14.8	9.3	11.5	6.1	19.0	:	8.9	19.5	30.8	4.0	:	
2000	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	HR	MK ³	TR	IS	LI	NO	CH		
Total	:	19 249	:	13 276	:	:	:	46 932	:	184 200	:	:	:	:	:	:	:		
Leisure	:	14 278	:	12 109	:	:	:	42 120	:	146 400	:	:	:	:	:	:	:		
Business	:	4 971	:	1 167	:	:	:	4 812	:	37 800	:	:	:	:	:	:	:		
2006	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	HR	MK ³	TR	IS	LI	NO	CH		
Total	:	20 678	43 357	12 735	7 766	6 477	8 001	43 961	:	141 412	:	:	:	:	:	20 120	:		
Leisure	:	14 670	37 586	11 387	7 394	5 598	4 257	38 507	:	105 539	:	:	:	:	:	14 834	:		
Business	:	6 008	5 771	1 348	372	879	3 744	5 454	:	35 873	:	:	:	:	:	5 286	:		
Average annual growth rate % 2000-2006																			
Total	:	1.2	:	-0.7	:	:	:	-1.1	:	-4.3	:	:	:	:	:	:	:		
Leisure	:	0.5	:	-1.0	:	:	:	-1.5	:	-5.3	:	:	:	:	:	:	:		
Business	:	3.2	:	2.4	:	:	:	2.1	:	-0.9	:	:	:	:	:	:	:		
% distribution 2006																			
Total	:	100.0	100.0	100.0	100.0	100.0	100.0	100.0	:	100.0	:	:	:	:	:	100.0	:		
Leisure	:	70.9	86.7	89.4	95.2	86.4	53.2	87.6	:	74.6	:	:	:	:	:	73.7	:		
Business	:	29.1	13.3	10.6	4.8	13.6	46.8	12.4	:	25.4	:	:	:	:	:	26.3	:		

1) 2001 data. 2) Average annual growth rate 2001-2006 for BE and IE. 3) Provisional code which does not prejudice in any way the definitive nomenclature for this country, which will be agreed following the conclusion of negotiations currently taking place on this subject at the United Nations.

Looking at the evolution between 2000 and 2006, nights spent on short trips for leisure purposes showed a higher increase than nights spent on business trips for Greeks (+28.1% on annual average), the Irish (+9.2%, 2001-2006 data) and Italians (+4.6%). This trend is the same as already discussed for the number of trips. In contrast, nights spent on short trips for business reasons increased more than leisure trips for German (+15.0% versus 8.8%), French (+9.0% versus +3.8%), Luxembourg (+10.4% versus +9.1%) and Austrian tourists (+3.2% versus +0.5%). In Belgium and Denmark, nights spent on leisure trips showed a steady increase whereas the number

of nights spent on business trips decreased (+2.7% versus -5.2% annual average and +2.4% versus -1.2%, respectively). Conversely, in Spain, Portugal and Finland, nights spent on business trips increased while nights on leisure trips decreased (+41.5% versus -1.2%, +2.4% versus -1.0% and +2.1% versus -1.5%, respectively). The United Kingdom saw a decrease in both business and leisure trips (annual average of -0.9% and -5.3% respectively). As said, the trend in nights was mirrored by the number of trips, making for stability in the average length of stay.

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Looking at the duration of short trips by purpose (Table 3.6), in 2006, 1-3 night leisure trips generally lasted from a minimum of 1.7 nights for Baltic tourists to a maximum of 2.3 nights for Slovaks. At 1.5 nights, Finnish tourists

recorded the minimum length of stay for business trips. The maximum was registered for Greek and Spanish tourists (2.0 nights). In general, this means that leisure trips were generally longer than business trips.

Table 3.6 - Trips of 1-3 nights by purpose: average length of stay, 2000 and 2006 (nights)

2000	EU-27	BE ¹	BG	CZ	DK	DE	EE	IE ¹	EL	ES	FR	IT	CY	LV	LT	LU	HU	MT
Total	:	2.0	:	:	2.2	2.3	:	2.0	2.1	1.9	1.8	1.8	:	:	:	2.0	:	:
Leisure	:	2.1	:	:	2.5	2.5	:	2.1	2.2	1.9	1.9	1.9	:	:	:	2.1	:	:
Business	:	1.7	:	:	1.6	2.0	:	1.7	2.1	2.0	1.6	1.7	:	:	:	1.8	:	:
2006	EU-27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	IT	CY	LV	LT	LU	HU	MT
Total	:	2.0	:	1.9	2.0	1.8	1.7	2.0	2.1	2.0	1.8	1.9	:	1.7	1.7	2.0	1.9	:
Leisure	:	2.1	:	2.0	2.2	1.9	1.7	2.0	2.1	2.0	1.8	1.9	:	1.7	1.7	2.1	1.9	:
Business	:	1.7	:	1.6	1.7	1.5	1.8	1.7	2.0	2.0	1.6	1.6	:	1.8	1.8	1.8	1.7	:
2000	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	HR	MK ²	TR	IS	LI	NO	CH	
Total	:	1.9	:	1.7	:	:	:	2.2	:	2.0	:	:	:	:	:	:	:	
Leisure	:	2.0	:	1.7	:	:	:	2.3	:	2.2	:	:	:	:	:	:	:	
Business	:	1.6	:	1.8	:	:	:	1.5	:	1.7	:	:	:	:	:	:	:	
2006	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	HR	MK ²	TR	IS	LI	NO	CH	
Total	:	1.9	1.8	1.8	2.1	1.9	2.1	1.8	:	1.9	:	:	:	:	:	1.4	:	
Leisure	:	2.1	1.8	1.8	2.1	1.9	2.3	1.8	:	2.0	:	:	:	:	:	1.4	:	
Business	:	1.7	1.8	1.7	1.8	1.8	1.8	1.5	:	1.7	:	:	:	:	:	1.4	:	

1) 2001 data. 2) Provisional code which does not prejudice in any way the definitive nomenclature for this country, which will be agreed following the conclusion of negotiations currently taking place on this subject at the United Nations.

As mentioned for Table 3.3, these average values depend on the weight of leisure and business trips in the total number of short trips made by residents in each country, in terms of both the number of trips and nights spent. For Danes, for example, leisure trips accounted for about 72% of total trips and about 76% of total nights. The same was noted for tourists from Germany, Ireland, Italy, Luxembourg, Austria and the United Kingdom, where the nights spent on leisure trips as a proportion of the whole were about 3 to 5 percentage points higher than the proportion in terms of the number of trips. Conversely, for Slovakian tourists, business trips accounted for 52.2% of the total number and 46.8% of total nights. Contrary to other countries, business trips made by tourists residing in Baltic countries (Estonia, Latvia and Lithuania) were slightly longer than leisure trips (1.8 nights as against 1.7 nights).

Comparing 2000 and 2006, 7 of the 13 countries for which data are available recorded a decrease in the duration of short leisure trips made by their tourists. This was particularly true for German (from 2.5 to 1.9 nights), Finnish (from 2.3 to 1.8 nights) and Danish (from 2.5 to 2.2 nights), tourists. Growth was recorded for Spaniards, Austrians and Portuguese (from 1.9 to 2.0, from 2.0 to 2.1 and from 1.7 to 1.8 nights, respectively). Short business trips for all countries except Germany, which recorded a decrease from 2.0 to 1.5 nights, were substantially stable in duration over the period analysed.

Turning now to holiday trips of 4 nights or more, Table 3.7 describes the evolution and distribution of total holiday trips for each European country by destination (domestic or outbound). These data indicate persisting discrepancies between European countries concerning the distribution of long domestic and outbound holiday trips.

In 2006, tourists living in the Benelux countries, the Baltic States, Denmark, the United Kingdom, Ireland, Slovenia and the German-speaking countries (Germany and Austria) preferred to spend trips of 4 nights or more abroad. Percentages ranged from about 53% for Latvian to almost 100% for Luxembourg tourists. In contrast, residents of southern European countries (Greece, Spain, France, Italy and Portugal), Finland and all the other new Member States for which data are available prefer to spend holidays in their own country, with figures ranging from 53.0% for Slovaks to 89.0% for Greeks.

Looking at the development from 2000 to 2006, domestic trips for holiday purposes showed the highest increase of +9.9% on average each year, both in a country where domestic tourism dominates (Greece) and in another where outbound tourism is prevalent (Austria). Good growth of domestic trips was also recorded in Spain (+5.2%), Denmark (+4.6%), Finland (+3.4%), the Netherlands (+3.3%) and Italy (+2.5%).

Table 3.7 - Trips of 4 nights or more: total holiday trips by destination, 2000 and 2006 (1 000)

2000	EU-27	BE	BG	CZ	DK	DE	EE ¹	IE ²	EL	ES	FR	IT	CY ¹	LV	LT	LU	HU	MT	
Total	:	6 374	:	:	4 556	105 650	313	3 218	4 753	27 988	75 752	35 457	:	:	:	570	:	:	
Domestic	:	1 142	:	:	1 406	35 898	167	1 057	4 330	25 108	63 025	27 382	:	:	:	2	:	:	
Outbound	:	5 232	:	:	3 150	69 752	146	2 161	423	2 880	12 727	8 075	426	:	:	568	:	:	
2006	EU-27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	IT	CY	LV	LT	LU	HU ³	MT	
Total	:	6 647	:	8 934	5 896	105 431	279	4 790	8 578	39 599	83 137	41 135	:	909	1 090	679	7 115	:	
Domestic	:	1 265	:	4 985	1 842	40 453	91	1 084	7 632	34 110	69 386	31 030	:	429	411	2	4 112	:	
Outbound	:	5 382	:	3 949	4 054	64 978	188	3 706	946	5 489	13 751	10 105	533	480	679	677	3 003	:	
Average annual growth rate % 2000-2006⁴																			
Total	:	0.7	:	:	4.4	0.0	-2.8	8.3	10.3	6.0	1.6	3.0	:	:	:	3.0	:	:	
Domestic	:	1.7	:	:	4.6	2.0	-14.1	0.5	9.9	5.2	1.6	2.5	:	:	:	0.0	:	:	
Outbound	:	0.5	:	:	4.3	-1.2	6.5	11.4	14.4	11.3	1.3	4.6	5.8	:	:	3.0	:	:	
% distribution 2006																			
Total	:	100.0	:	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	:	100.0	100.0	100.0	100.0	:	
Domestic	:	19.0	:	55.8	31.2	38.4	32.6	22.6	89.0	86.1	83.5	75.4	:	47.2	37.7	0.3	57.8	:	
Outbound	:	81.0	:	44.2	68.8	61.6	67.4	77.4	11.0	13.9	16.5	24.6	:	52.8	62.3	99.7	42.2	:	
2000	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	HR	MK ⁵	TR	IS	LI	NO	CH		
Total	15 529	5 689	:	3 688	:	:	:	5 261	:	78 000	:	:	:	:	:	5 096	:		
Domestic	5 749	1 811	:	3 024	:	:	:	3 755	:	38 700	:	:	:	:	:	2 702	:		
Outbound	9 780	3 878	:	664	:	:	:	1 506	:	39 300	:	:	:	:	:	2 394	:		
2006	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	HR	MK ⁵	TR	IS	LI	NO	CH		
Total	18 384	8 745	17 808	3 663	3 387	1 807	4 555	6 620	:	61 821	:	:	:	:	:	5 981	:		
Domestic	6 986	3 195	14 341	2 888	2 977	498	2 416	4 576	:	28 521	:	:	:	:	:	2 788	:		
Outbound	11 398	5 550	3 467	775	410	1 309	2 139	2 044	:	33 300	:	:	:	:	:	3 193	:		
Average annual growth rate % 2000-2006																			
Total	2.9	7.4	:	-0.1	:	:	:	3.9	:	-3.8	:	:	:	:	:	2.7	:		
Domestic	3.3	9.9	:	-0.8	:	:	:	3.4	:	-5.0	:	:	:	:	:	0.5	:		
Outbound	2.6	6.2	:	2.6	:	:	:	5.2	:	-2.7	:	:	:	:	:	4.9	:		
% distribution 2006																			
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	:	100.0	:	:	:	:	:	100.0	:		
Domestic	38.0	36.5	80.5	78.8	87.9	27.6	53.0	69.1	:	46.1	:	:	:	:	:	46.6	:		
Outbound	62.0	63.5	19.5	21.2	12.1	72.4	47.0	30.9	:	53.9	:	:	:	:	:	53.4	:		

1) 2002 data. 2) 2001 data. 3) 2005 data. 4) Average annual growth rate 2002-2006 for EE and CY and 2001-2006 for IE. 5) Provisional code which does not prejudice in any way the definitive nomenclature for this country, which will be agreed following the conclusion of negotiations currently taking place on this subject at the United Nations.

Outbound trips, in contrast, increased more in countries where tourists usually spend a large part of their holidays within national boundaries: Greece saw a +14.4% annual average increase, Spain +11.3%, Finland +5.2% and Italy +4.6%. The only exceptions were Ireland (+11.4% on annual average from 2001 to 2006), Estonia (+6.5%) and Austria (+6.2%), where residents already spend the majority of their holidays abroad.

This confirms that the travel behaviour of people residing in the EU-27 countries has gradually changed since the beginning of the 21st century. In countries like Belgium, for example, the number of domestic trips by residents in absolute terms has grown more than the number of trips abroad. Consequently, their share in total trips rose from 17.9% in 2000 to 19.0% in 2006, while the proportion of outbound tourist trips declined from 82.1% to 81.0% accordingly. On the other hand, outbound trips by Greek tourists in absolute figures increased at a higher rate than domestic trips. Consequently, their share grew from 8.9% in 2000 to 11.0% in 2006, at the expense of domestic tourism (falling from 91.1% to 89.0%).

Table 3.8 shows the evolution and distribution of nights spent by tourists on holiday trips of 4 nights or more by destination. For the majority of countries for which data are available, in 2006, the share of nights spent on outbound holiday trips of 4 nights or more was higher than on domestic trips.

As for trips, in 2006, tourists living in the Benelux countries, the German-speaking countries (Germany and Austria), Ireland and the United Kingdom generally spent more nights abroad than in their country of residence, with percentages ranging from about 66.8% in the United Kingdom to almost 100% in Luxembourg. In these countries, the share of nights spent by their tourists abroad was generally higher than that of the number of trips, confirming the longer duration of outbound trips. For example, British tourists spent 53.9% of total trips of 4 nights and more abroad, and 66.8% of total nights.

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Table 3.8 - Trips of 4 nights or more: total holiday nights by destination, 2000 and 2006 (1 000)

2000	EU-27	BE	BG	CZ	DK	DE	EE ¹	IE ²	EL	ES	FR	IT	CY ¹	LV	LT	LU	HU	MT	
Total	: 73 082				: 42 371	1 240 103	3 282	32 381	58 271	371 633	757 008	434 863				: 6 508			
Domestic	: 11 237				: 10 858	343 137	1 474	8 063	51 903	337 577	624 530	344 408				: 17			
Outbound	: 61 845				: 31 513	896 966	1 808	24 318	6 368	34 056	132 478	90 455	5 454			: 6 491			
2006	EU-27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	IT	CY	LV	LT	LU	HU ³	MT	
Total	: 77 984			: 76 109	53 355	1 064 578	2 395	45 279	104 481	407 003	801 237	478 040		: 8 237	12 324	6 849	53 101		
Domestic	: 11 630			: 40 430	12 660	330 480	688	8 391	92 058	339 347	661 822	371 657		: 2 911	3 280	20	27 826		
Outbound	: 66 354			: 35 679	40 695	734 098	1 707	36 888	12 423	67 656	139 415	106 383	6 882	5 326	9 044	6 829	25 275		
Average annual growth rate % 2000-2006⁴																			
Total	: 1.1			: 3.9		-2.5	-7.6	6.9	10.2	1.5	1.0	1.6				: 0.9			
Domestic	: 0.6			: 2.6		-0.6	-17.3	0.8	10.0	0.1	1.0	1.3				: 2.7			
Outbound	: 1.2			: 4.4		-3.3	-1.4	8.7	11.8	12.1	0.9	2.7	6.0			: 0.8			
% distribution 2006																			
Total	: 100.0			: 100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0		: 100.0	100.0	100.0	100.0	100.0	
Domestic	: 14.9			: 53.1	23.7	31.0	28.7	18.5	88.1	83.4	82.6	77.7		: 35.3	26.6	0.3	52.4		
Outbound	: 85.1			: 46.9	76.3	69.0	71.3	81.5	11.9	16.6	17.4	22.3		: 64.7	73.4	99.7	47.6		
2000	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	HR	MK ⁵	TR	IS	LI	NO	CH		
Total	180 037	63 711		: 40 243				: 43 758		: 706 600						: 50 894			
Domestic	58 492	17 473		: 32 027				: 26 861		: 262 800						: 24 004			
Outbound	121 545	46 238		: 8 216				: 16 897		: 443 800						: 26 890			
2006	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	HR	MK ⁵	TR	IS	LI	NO	CH		
Total	194 714	76 400	186 368	38 804	29 953	14 866	38 215	51 481	109 899	578 620						: 63 016			
Domestic	61 653	23 010	136 257	29 025	22 564	3 349	17 131	32 340	50 552	191 920						: 27 097			
Outbound	133 061	53 390	50 111	9 779	7 389	11 517	21 084	19 141	59 347	386 700						: 35 919			
Average annual growth rate % 2000-2006																			
Total	1.3	3.1		: -0.6				: 2.7		: -3.3						: 3.6			
Domestic	0.9	4.7		: -1.6				: 3.1		: -5.1						: 2.0			
Outbound	1.5	2.4		: 2.9				: 2.1		: -2.3						: 4.9			
% distribution 2006																			
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0						: 100.0			
Domestic	31.7	30.1	73.1	74.8	75.3	22.5	44.8	62.8	46.0	33.2						: 43.0			
Outbound	68.3	69.9	26.9	25.2	24.7	77.5	55.2	37.2	54.0	66.8						: 57.0			

1) 2002 data. 2) 2001 data. 3) 2005 data. 4) Average annual growth rate 2001-2006 for BG and IE and 2002-2005 for EE and CY. 5) Provisional code which does not prejudice in any way the definitive nomenclature for this country, which will be agreed following the conclusion of negotiations currently taking place on this subject at the United Nations.

In contrast, mainly tourists from southern Europe and Finland spent more nights at domestic holiday destinations, with the share ranging from 62.8% for Finnish to 88.1% for Greek tourists. However, for Greek, Spanish, French, Portuguese and Finnish tourists the share of trips was generally higher than nights, indicating the shorter duration of domestic trips. Italy was the only country in this group with a lower share in domestic nights than trips.

The trend varies for tourists residing in the new Member States. In Baltic States, Slovenia and Slovakia the largest proportion of tourist nights spent by residents were concentrated on long outbound trips (from 55.2% in Slovakia to 77.5% in Slovenia). Conversely, in Bulgaria, the Czech Republic, Hungary, Poland and Romania more than 50.0% of total nights were spent on long domestic trips.

As for trips, the dynamics of 2000-2006 showed that nights spent on domestic trips of 4 nights and more recorded the highest increases both in a country where outbound tourism dominates (Austria: +4.7% on average each year) and in

another where domestic tourism is prevalent (Greece: +10.0%). Good growth was also recorded in Finland (+3.1%), Luxembourg (+2.7%), Denmark (+2.6%), Norway (+2.0%) and France (+1.0%). On the other hand, a contraction in the number of nights characterised domestic holiday trips taken by Estonian (-17.3% on average each year, 2002-2006 data), British (-5.1%), Portuguese (-1.6%) and German tourists (-0.6%).

Two groups of countries registered a significant increase in nights spent on outbound trips. The first consists of countries whose tourists already spend a large part of their holidays abroad. These countries are Ireland (+8.7% annual average increase from 2001 to 2006), Norway (+4.9%), Denmark (+4.4%) and Austria (+2.4%). The other group consists of traditional tourism destinations such as Spain (+12.1% annual average increase), Greece (+11.8%) and Cyprus (+6.0%).

Looking at the average duration of long trips by destination (Table 3.9), in 2006, domestic trips of 4 nights or more generally lasted from a low of 6.7 nights for Slovenian and British tourists to a high of 14.5 nights for Polish tourists. Hungarian tourists (8.4 nights, 2005 data) recorded the lowest length of stay for outbound trips while Romanian tourists accounted for the highest (18.0 nights). In the Benelux region, the German-speaking countries, Ireland

and the United Kingdom, where residents make most trips abroad, the average duration of outbound trips ranged from 9.6 nights for Austrians to 12.3 nights for the Belgians. In southern Europe, where domestic tourism dominates, outbound trips lasted on average a bit longer, with values ranging from 10.1 nights for French tourists to 13.1 nights for Greeks.

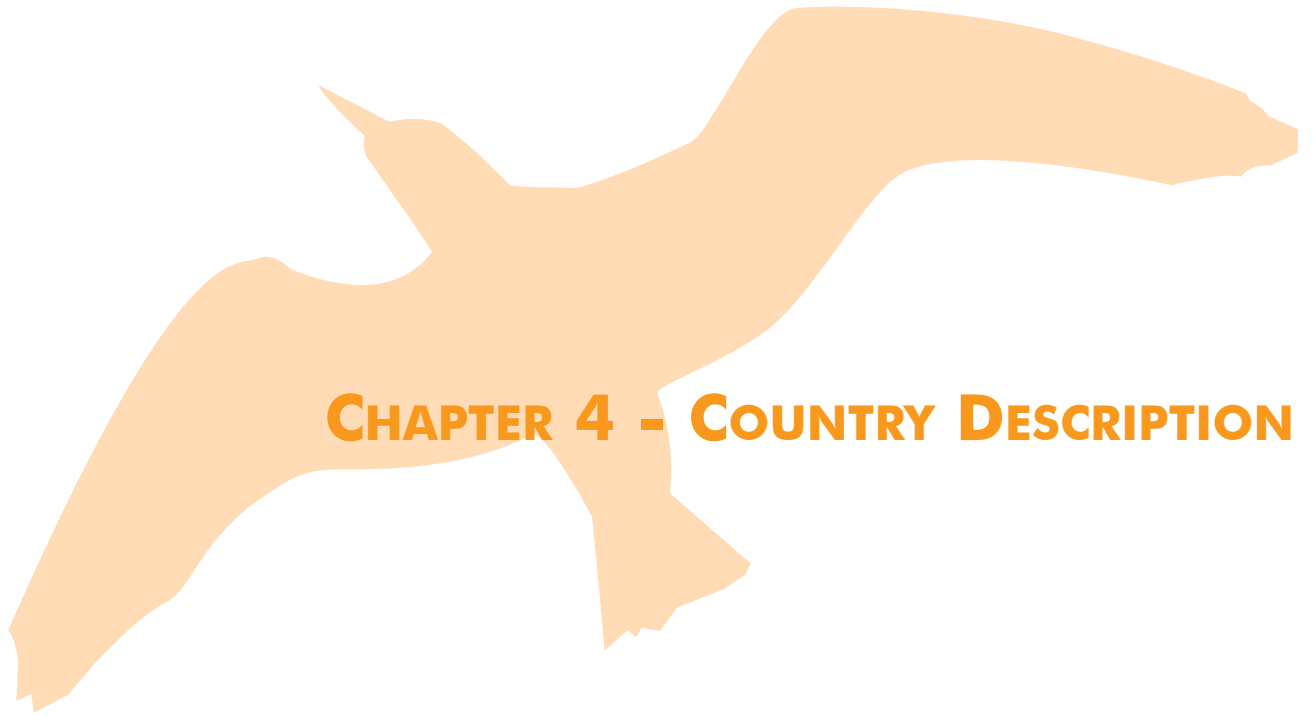
Table 3.9 - Trips of 4 nights or more by destination: average length of stay, 2000 and 2006 (nights)

2000	EU-27	BE	BG	CZ	DK	DE	EE ¹	IE ²	EL	ES	FR	IT	CY ¹	LV	LT	LU	HU	MT
Total	:	11.5	:	:	9.3	11.7	10.5	10.1	12.3	13.3	10.0	12.3	:	:	:	11.4	:	:
Domestic	:	9.8	:	:	7.7	9.6	8.8	7.6	12.0	13.4	9.9	12.6	:	:	:	8.5	:	:
Outbound	:	11.8	:	:	10.0	12.9	12.4	11.3	15.1	11.8	10.4	11.2	12.8	:	:	11.4	:	:
2006	EU-27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	IT	CY	LV	LT	LU	HU ³	MT
Total	:	11.7	:	8.5	9.0	10.1	8.6	9.5	12.2	10.3	9.6	11.6	:	9.1	11.3	10.1	7.5	:
Domestic	:	9.2	:	8.1	6.9	8.2	7.6	7.7	12.1	9.9	9.5	12.0	:	6.8	8.0	10.0	6.8	:
Outbound	:	12.3	:	9.0	10.0	11.3	9.1	10.0	13.1	12.3	10.1	10.5	12.9	11.1	13.3	10.1	8.4	:
2000	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	HR	MK ⁴	TR	IS	LI	NO	CH	
Total	11.6	11.2	:	10.9	:	:	:	8.3	:	9.1	:	:	:	:	:	10.0	:	
Domestic	10.2	9.6	:	10.6	:	:	:	7.2	:	6.8	:	:	:	:	:	8.9	:	
Outbound	12.4	11.9	:	12.4	:	:	:	11.2	:	11.3	:	:	:	:	:	11.2	:	
2006	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	HR	MK ⁴	TR	IS	LI	NO	CH	
Total	10.6	8.7	10.5	10.6	8.8	8.2	8.4	7.8	:	9.4	:	:	:	:	:	10.5	:	
Domestic	8.8	7.2	9.5	10.1	7.6	6.7	7.1	7.1	:	6.7	:	:	:	:	:	9.7	:	
Outbound	11.7	9.6	14.5	12.6	18.0	8.8	9.9	9.4	:	11.6	:	:	:	:	:	11.2	:	

1) 2002 data. 2) 2001 data. 3) 2005 data. 4) Provisional code which does not prejudice in any way the definitive nomenclature for this country, which will be agreed following the conclusion of negotiations currently taking place on this subject at the United Nations.

As mentioned above, the duration also depends on the chosen destination. The fact that most outbound trips are short- to medium-haul and within Europe (see chapter 1) explains why the gap between outbound and domestic trips is not very large.

The evolution between 2000 and 2006 highlights that in most countries for which data are available the average duration of all tourist trips of 4 nights and more showed a slight decrease. This was reflected in both domestic and outbound tourism. For example, the average length of stay by German and Austrian tourists declined between 1-3 nights both at home and abroad. A relatively stable situation for both domestic and outbound trips was only recorded in France, Portugal and the United Kingdom.



CHAPTER 4 - COUNTRY DESCRIPTION

4. COUNTRY DESCRIPTION

4.1 Introduction

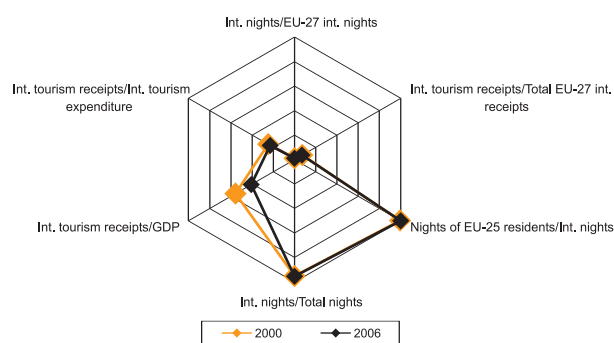
This chapter discusses the recent tourism performances (2000 and 2006) of each country in the EU-27, starting with a set of indicators describing the international attractiveness of each country within the EU-27, its dependency on intra-area demand, the level of market internationalisation (in terms of demand and receipts) and the economic contribution of tourism to the local economy.

The analysis focuses on EU-27 or EU-25 countries, depending on the indicators used, as some data are still missing for Bulgaria and Romania.

Specifically, the six selected indicators used are:

1. The share of international nights spent in collective accommodation in a country as a proportion of total international nights in the EU-27 area (percentage values), which measures the capacity of the country to attract international tourists compared with the EU-27 area as a whole.
2. The share of international tourism receipts in the country as a proportion of total international receipts in the EU-27 area (percentage values), which shows how much the country gains relatively from international tourism compared with the area as a whole.
3. The share of tourism nights spent by EU-25 residents as a proportion of total international nights in the country (percentage values). This indicator gives information on the level of intra-area (EU-25) tourism demand. As mentioned above, this indicator is based on the EU-25 area since data on nights spent by tourists from Bulgaria and Romania are missing.
4. The proportion of international tourism nights as a share of total tourism nights (in collective accommodation) in the country (percentage values), which measures the level of internationalisation of the local tourism market.
5. The proportion of international tourism receipts as a share of GDP (percentage values), which measures the contribution of international tourism to the country's economy and welfare.
6. The ratio of international tourism receipts to expenditure, which measures the tourism balance. It compares the revenues generated by foreign tourists in the country with expenditure by residents abroad. The more receipts outweigh expenditure, the more positive the tourism balance and the greater the gain from international tourism. On the other hand, the more expenditure exceeds receipts, the more negative the tourism balance and the greater the loss due to outbound tourism.

A graphical tool called "spider plot" was used to summarise each country's overall tourism performance in 2000 and 2006. Normalised values (0-1) for each indicator are each shown as a point along a separate axis. The normalised values were chosen in order to give a uniform and comparable range of values for all indicators, avoiding the overestimation of some of them and making their overall presentation easier. The hexagons obtained by linking the six points on the six axes by a line produce the country profiles in 2000 and 2006, respectively. The normalised values (0-1) for each indicator, representing the vertices of the hexagon, were calculated by taking the maximum value for each indicator of all values for the two reference years 2000 and 2006 for EU-27 or EU-25 countries, and dividing each country's data by that value. For example, taking the share of nights from the EU-25 area as a proportion of total international nights in the country (indicator No 3) gives the country with the highest share of these nights (e.g. Luxembourg in 2006). The data for all other countries in 2000 and 2006 were then divided by the value for Luxembourg in order to calculate the normalised values. The following graph shows an example of a spider plot.



The strength of this tool is that it provides a dynamic presentation of the set of indicators (multivariate indicator) together in one graph for each country and for the two years considered. It depicts simultaneously the variations in each indicator and the evolution of a country's performance in the two years considered. In addition, when the spider plots of different countries are compared, some common patterns can be isolated and discussed and therefore clusters of similar countries identified.

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4.2. Tourism performance in the EU-27 area in 2000 and 2006: country profiles

The following table lists the EU-27 countries according to the information derived from the spider plots and their role in the tourism market.

Table 4.1 - Classification of EU-27 countries

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

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

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

Origin/destination countries are those that are both generators and destinations of international tourism. They can be divided into two main groups: countries that are mainly a source and destination of leisure tourism (France, Italy, Ireland) and countries that are mainly a source and destination for specific market segments. For example, Belgium is mainly an important destination for business tourism (Brussels) and a source of leisure tourism abroad. The United Kingdom also belongs to this group but it covers more market segments than Belgium.

In some cases, origin/destination countries may be countries in transition, i.e. countries that were sources or destinations of international tourism flows but have seen a change in tourism behaviour in recent years. For example, Italy is acknowledged as one of the most important tourist destinations in the world. In the past few years, however, it has seen an increase in outbound tourism and hence a decrease in the ratio of tourist receipts to expenditure, which means that expenditure by Italian tourists abroad is growing much more than international receipts. This trend is making travel behaviour in Italy more similar to that of other countries that are traditionally generators of international tourism (e.g. Germany).

The following paragraphs show the tourism profile of each of the EU-27 countries in 2000 and 2006. Each profile includes two tables and a spider plot. The first table presents the value assumed by the six main tourism indicators described above, while the second focuses on the six main markets of international tourism in the country. The spider plot shows the tourism performance of each country in 2000 and 2006.

4.2.1 Belgium

Belgium with its capital Brussels is one of the most important business tourism destinations in Europe and a holiday destination for people from neighbouring countries (mainly the Netherlands). However, it is also a country that generates a steady volume of outbound tourism flows.

Table 4.2.1.1 - Main tourism indicators: Belgium in 2000 and 2006

Indicators	2000	2006
- Share of international nights in the country as a proportion of total international nights in the EU-27	1.7%	1.7%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-27 ¹	3.4%	3.6%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	84.1%	84.4%
- Proportion of international tourism nights compared with total tourism nights in the country	53.1%	54.6%
- Proportion of international tourism receipts ¹ in GDP	2.9%	2.9%
- Ratio of international tourism receipts to expenditure ¹	0.68	0.66

1) 2002 data used for 2000.

The prevalence of short-stay business tourism explains why the number of international tourists in the country is lower than its tourism gains within the EU-27 area. In 2006, Belgium accounted for less than 2% of total international nights spent in the EU-27 but more than 3% of international tourism receipts (Table 4.2.1.1). This means that the profit margin on incoming tourism was higher than the volume of incoming tourism. The trend was stable in comparison to 2000. The share of international tourism nights as a proportion of total tourism nights in the country amounted to about 55% in 2006 (about 53% in 2000), but the proportion of nights from the EU-25 area compared to total international nights was very high (about 84% in both years). This highlights the strong influence of intra-area tourism on the national market.

Looking at the six main markets of origin, in 2006, five out of six were in the EU-27 area (the Netherlands, the United Kingdom, France, Germany and Spain) and accounted for about 74% of total international tourism nights (about 75% in 2000). The United States ranked fifth with a share of 3.9% (4.7% in 2000). Compared with 2000, Spain took over sixth position at the expense of Italy (Table 4.2.1.2).

The contribution of tourism to the country's GDP amounted to 2.9% in 2006, while the ratio of international tourism receipts to expenditure, which measures the tourism balance, was 66%. This means that expenditure by foreign tourists in the country exceeded expenditure by domestic tourists abroad.

The following spider plot summarises the evolution of the global tourism performance of Belgium in 2000 and 2006, according to the six indicators considered above.

Figure 4.2.1 - Situation of tourism in Belgium in 2000 and 2006

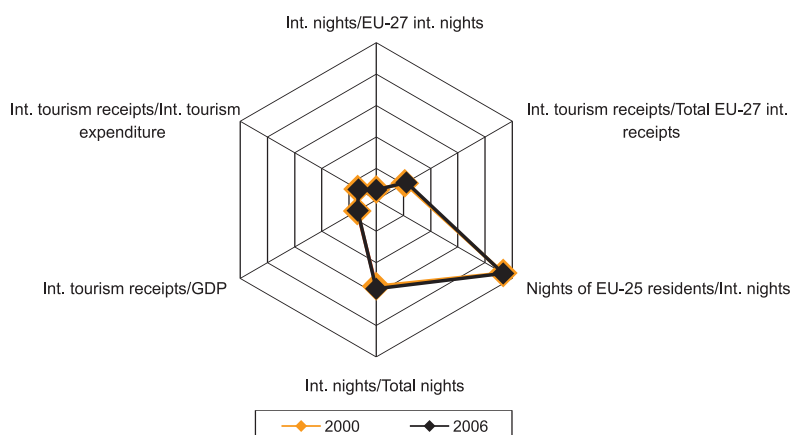


Table 4.2.1.2 - Main tourism markets in Belgium - nights spent by non-residents (as % of total nights), 2000 and 2006

Markets	2000		2006	
	Country	%	Country	%
- 1st market	NL	31.1	NL	32.1
- 2nd market	UK	16.1	UK	13.7
- 3rd market	DE	14.9	FR	12.9
- 4th market	FR	10.2	DE	12.0
- 5th market	US	4.7	US	3.9
- 6th market	IT	3.0	ES	3.0

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4.2.2 Bulgaria

Bulgaria is one of the two new Member States that joined the European Community in 2007. It is an emerging destination for international tourism in Europe, especially for resident tourists and non-resident tourists coming from central European markets.

Table 4.2.2.1 - Main tourism indicators: Bulgaria in 2000 and 2006

Indicators	2000	2006
- Share of international nights in the country as a proportion of total international nights in the EU-27	0.6%	1.3%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-27	0.5%	0.8%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country ¹	70.9%	74.1%
- Proportion of international tourism nights compared with total tourism nights in the country	60.4%	68.8%
- Proportion of international tourism receipts in GDP	8.6%	8.2%
- Ratio of international tourism receipts to expenditure	2.00	1.76

1) For 2000, share of nights spent by EU-15 residents.

Bulgaria's attractiveness within the EU-27 area is still low. In 2006, the country accounted for about 1.3% of total international nights (0.6% in 2000) and less than 1% of total international tourism receipts within the EU-27 (0.5% in 2000, Table 4.2.2.1). The weight of international tourism is rather strong. In 2006, the share of foreign nights as a proportion of total tourism nights in the country amounted to 68.8% (against 60.4% in 2000). Tourists coming from the EU-25 area, in particular from neighbouring countries, spent about 74% of these nights.

Germany is the main market of origin, accounting for about a third of total tourism nights (about 45% in 2001). The United Kingdom ranked second with 15.0%, more than doubling its share in comparison to 2001 (6.3%), followed by Sweden (3.8%), Denmark (3.2%), Finland and Norway (2.9% each). Globally, the first six markets covered about

59% of total international tourism nights in 2006 (around 65% in 2001, Table 4.2.2.2).

Tourism contributes substantially to the local economy. In 2006, international tourism receipts accounted for 8.2% of total GDP (8.6% in 2000) and represented almost twice the amount of tourism expenditure (1.8 versus 2.0 in 2000). This indicates that inbound tourism is much higher than outbound tourism.

The following spider plot summarises the evolution of the global tourism performance of Bulgaria in 2000 and 2006, according to the six indicators considered above.

Figure 4.2.2 - Situation of tourism in Bulgaria in 2000 and 2006

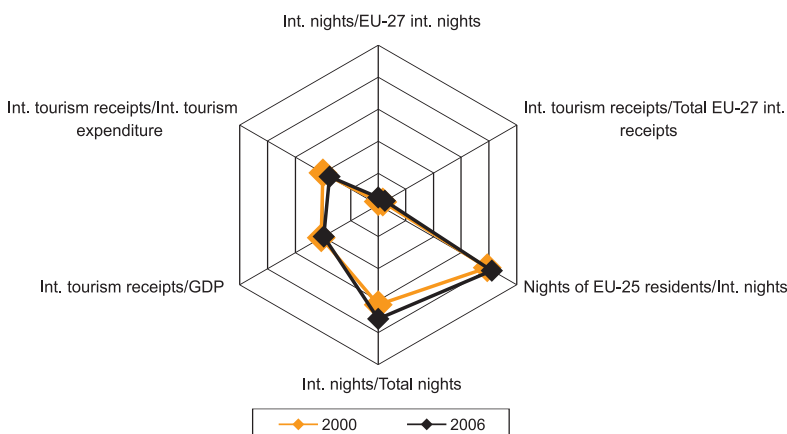


Table 4.2.2.2 - Main tourism markets in Bulgaria - nights spent by non-residents (as % of total nights), 2001 and 2006

Markets	2001 ¹		2006	
	Country	%	Country	%
- 1st market	DE	44.7	DE	30.7
- 2nd market	UK	6.3	UK	15.0
- 3rd market	CH	4.8	SE	3.8
- 4th market	BE	3.5	DK	3.2
- 5th market	FI	3.0	FI	2.9
- 6th market	AT	2.7	NO	2.9

1) Data for 2000 not available.

4.2.3 Czech Republic

The Czech Republic and particularly its capital Prague represent an ever-growing destination for international tourism in Europe, especially for tourists coming from central European markets.

Table 4.2.3.1 - Main tourism indicators: Czech Republic in 2000 and 2006

Indicators	2000	2006
- Share of international nights in the country as a proportion of total international nights in the EU-27	1.7%	2.1%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-27	1.5%	1.6%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country ¹	70.1%	72.6%
- Proportion of international tourism nights compared with total tourism nights in the country	35.3%	48.5%
- Proportion of international tourism receipts in GDP	5.3%	3.5%
- Ratio of international tourism receipts to expenditure	2.33	1.88

1) For 2000, share of nights spent by EU-15 residents.

In 2006, the country accounted for 2.1% of total international nights spent in the EU-27 area (1.7% in 2000) and about 1.6% of international tourism receipts (1.5% in 2000, Table 4.2.3.1). This means a low average receipt per night in comparison to other countries and reveals that the profit margin on incoming tourism was lower than the volume of incoming tourism. In 2006, non-resident tourists spent about 49% of total nights (about 35% in 2000). Around 73% of these tourists came from the EU-25. This highlights the strong influence of intra-area tourism on the national market.

Taking into account the six main markets of origin, in 2006, Germany ranked first with 30.1% of total international tourism nights (38.3% in 2000), followed by the United Kingdom with 7.6% (5.4%) and Italy with 5.7% (4.7%). The

other EU-27 markets included in the ranking were the Netherlands with 5.2% and Slovakia with 4.0%. The United States ranked fifth with a share of 4.8% (Table 4.2.3.2).

The contribution of international tourism receipts to the country's GDP decreased from 2000 to 2006 (from 5.3% to 3.5%), as did the ratio of international tourism receipts to expenditure (from 2.3 to 1.9). These figures indicate that although expenditure by foreign tourists in the country remained well above expenditure by Czech tourists abroad, there was a decline in average expenditure by international tourists.

The following spider plot summarises the evolution of the global tourism performance of the Czech Republic in 2000 and 2006, according to the six indicators considered above.

Figure 4.2.3 - Situation of tourism in the Czech Republic in 2000 and 2006

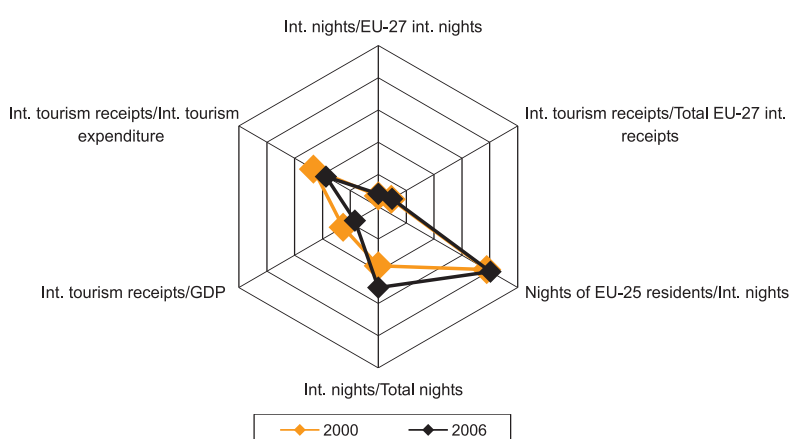


Table 4.2.3.2 - Main tourism markets in the Czech Republic - nights spent by non-residents (as % of total nights), 2002 and 2006

Markets	2002 ¹		2006	
	Country	%	Country	%
- 1st market	DE	38.3	DE	30.1
- 2nd market	PL	5.5	UK	7.6
- 3rd market	UK	5.4	IT	5.7
- 4th market	IT	4.7	NL	5.2
- 5th market	NL	4.2	US	4.8
- 6th market	SK	4.0	SK	4.0

1) Data for 2000 not available.

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4.2.4 Denmark

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

Table 4.2.4.1 - Main tourism indicators: Denmark in 2000 and 2006

Indicators	2000	2006
- Share of international nights in the country as a proportion of total international nights in the EU-27	1.1%	1.0%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-27	1.8%	1.6%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	73.2%	69.0%
- Proportion of international tourism nights compared with total tourism nights in the country	39.8%	34.7%
- Proportion of international tourism receipts in GDP	2.3%	1.9%
- Ratio of international tourism receipts to expenditure	0.79	0.76

In 2006, international nights spent in the country represented 1.0% of total international nights in the EU-27 area (1.1% in 2000, Table 4.2.4.1). The share of international tourism receipts was 1.6% (1.8% in 2000). This means that the profit margin on incoming tourism was higher than the volume of incoming tourism. Domestic tourism is prevalent. In both 2000 and 2006, the proportion of nights spent by non-residents as a proportion of total nights was lower than 40% (39.8% and 34.7% respectively). Tourists living in EU-25 countries spent 69.0% of these nights (73.2% in 2000).

The most important markets were the neighbouring countries Germany, Norway and Sweden, which accounted for nearly two-thirds of total international nights (68.6% in 2000). The Netherlands ranked fourth in this list (7.8% in 2006 versus 6.5% in 2000) followed by the United

Kingdom (6.2% versus 4.9%) and the United States (4.4% versus 3.3%, Table 4.2.4.2).

Receipts from international tourism amounted to about 1.9% of GDP in 2006 (2.3% in 2000) and accounted for 76% of expenditure (79% in 2000). This clearly confirms the dominance of outbound over inbound tourism.

The following spider plot summarises the evolution of the global tourism performance of Denmark in 2000 and 2006, according to the six indicators considered above.

Figure 4.2.4 - Situation of tourism in Denmark in 2000 and 2006

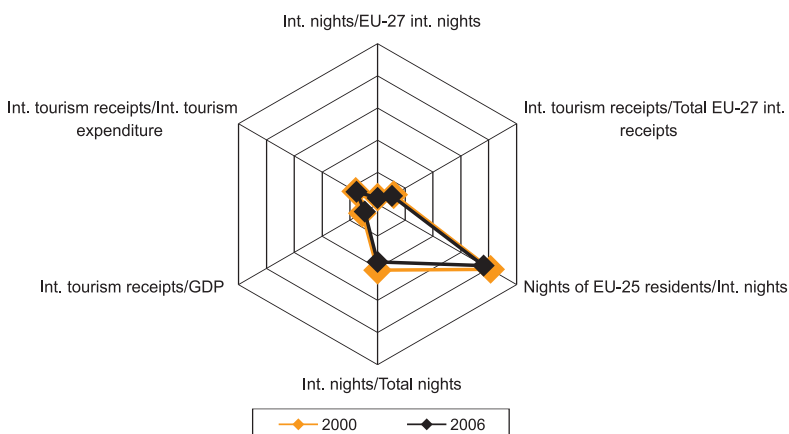


Table 4.2.4.2 - Main tourism markets in Denmark - nights spent by non-residents (as % of total nights), 2000 and 2006

Markets	2000		2006	
	Country	%	Country	%
- 1st market	DE	34.0	DE	28.4
- 2nd market	SE	20.8	NO	16.7
- 3rd market	NO	13.8	SE	16.4
- 4th market	NL	6.5	NL	7.8
- 5th market	UK	4.9	UK	6.2
- 6th market	US	3.3	US	4.4

4.2.5 Germany

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

Table 4.2.5.1 - Main tourism indicators: Germany in 2000 and 2006

Indicators	2000	2006
- Share of international nights in the country as a proportion of total international nights in the EU-27	4.8%	5.5%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-27	9.3%	10.3%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	61.1%	61.3%
- Proportion of international tourism nights compared with total tourism nights in the country	14.2%	15.1%
- Proportion of international tourism receipts in GDP	1.0%	1.1%
- Ratio of international tourism receipts to expenditure	0.35	0.44

In 2006, Germany accounted for 5.5% of total international nights spent within the EU-27 area (4.8% in 2000), but 10.3% of international tourism receipts (9.3% in 2000, Table 4.2.5.1). This means that the profit margin on incoming tourism was much higher than the volume of incoming tourism. The influence of international tourism is quite low. In 2006, the share of foreign nights as a proportion of total tourism nights in the country amounted to 15.1% (14.2% in 2000). Tourists coming from the EU-25 area countries spent more than 60% of these nights.

Four of the six main markets of origin were in the EU-27 area. The Netherlands ranked first with 16.6% (17.3% in 2000) of total international nights, followed by the United States with 8.8% (11.9% in 2000), the United Kingdom with 8.6% (9.6% in 2000), Switzerland (6.5%), Italy (5.4%) and Belgium (4.3%). Altogether, these markets covered about

50% of total international nights in the country (Table 4.2.5.2). The first three main markets lost shares between 2000 and 2006 while the next three (Switzerland, Italy and Belgium) could improve their position.

The contribution of international tourism receipts to the country's GDP (1.1%) is low compared to the other "old" Member States, confirming that the impact of tourism on the country's economy is still rather limited. In 2006, the ratio of international tourism receipts to expenditure was 44% (35% in 2000), which means that outbound tourism far exceeded inbound demand.

The following spider plot summarises the evolution of the global tourism performance of Germany in 2000 and 2006, according to the six indicators considered above.

4

Figure 4.2.5 - Situation of tourism in Germany in 2000 and 2006

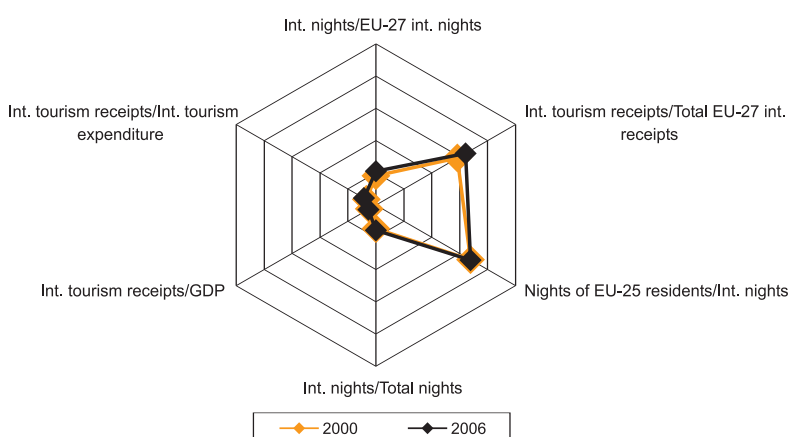


Table 4.2.5.2 - Main tourism markets in Germany- nights spent by non-residents (as % of total nights), 2000 and 2006

Markets	2000		2006	
	Country	%	Country	%
- 1st market	NL	17.3	NL	16.6
- 2nd market	US	11.9	US	8.8
- 3rd market	UK	9.6	UK	8.6
- 4th market	IT	5.3	CH	6.5
- 5th market	CH	5.1	IT	5.4
- 6th market	FR	4.2	BE	4.3

COUNTRY DESCRIPTION

4.2.6 Estonia

Estonia, one of the Baltic States, is an emerging destination of tourism in Europe.

Table 4.2.6.1 - Main tourism indicators: Estonia in 2000 and 2006

Indicators	2000	2006
- Share of international nights in the country as a proportion of total international nights in the EU-27	0.1%	0.3%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-27	0.3%	0.3%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	82.4%	84.0%
- Proportion of international tourism nights compared with total tourism nights in the country	73.2%	66.5%
- Proportion of international tourism receipts in GDP	9.0%	6.2%
- Ratio of international tourism receipts to expenditure	2.48	1.74

Estonia's attractiveness within the EU-27 area is still low. In 2006, the country accounted for less than 0.5% of both total international nights and total international tourism receipts within the EU-27 (Table 4.2.6.1). The weight of international tourism is strong. In 2006, the share of foreign nights as a proportion of total tourism nights in the country amounted to 66.5% (73.2% in 2000). Tourists coming from the EU-25 area, in particular from neighbouring countries, spent 84.0% of these nights (82.4% in 2000).

Finland is the main market of origin, accounting for about 50% of total tourism nights (around 59% in 2002). Sweden ranked second with 7.8% (6.2% in 2002), followed by Germany 6.1% (5.8% in 2002), the United Kingdom (5.2% against 4.1%), Norway (4.5% against 2.8%) and Latvia (3.4%). Globally, these markets covered about 77% of total international tourism nights in 2006. Compared with 2002,

Latvia ranked sixth, overtaking the United States, and contributed to a growth in intra-area tourism (Table 4.2.6.2).

Tourism contributes substantially to the local economy. In 2006, international tourism receipts accounted for 6.2% of total GDP (9.0% in 2000). Its absolute figure was almost twice the amount of tourism expenditure (1.7 versus 2.5 in 2000). This indicates that inbound tourism was much higher than outbound tourism.

The following spider plot summarises the evolution of the global tourism performance of Estonia in 2000 and 2006, according to the six indicators considered above.

Figure 4.2.6 - Situation of tourism in Estonia in 2000 and 2006

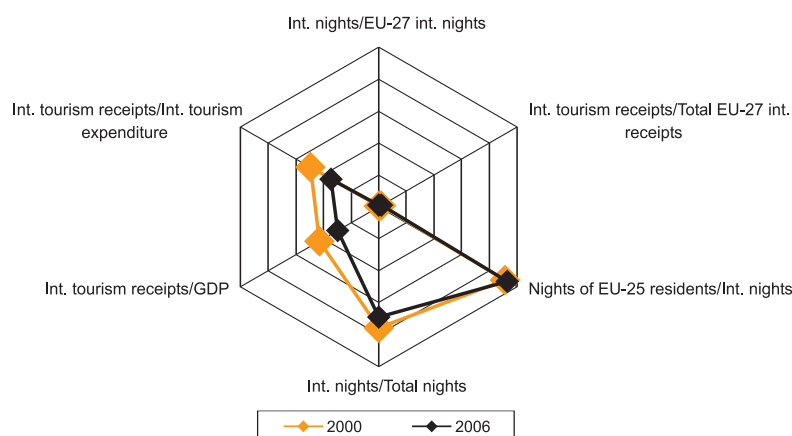


Table 4.2.6.2 - Main tourism markets in Estonia - nights spent by non-residents (as % of total nights), 2002 and 2006

Markets	2002 ¹⁾		2006	
	Country	%	Country	%
- 1st market	FI	58.7	FI	49.7
- 2nd market	SE	6.2	SE	7.8
- 3rd market	DE	5.8	DE	6.1
- 4th market	UK	4.1	UK	5.2
- 5th market	NO	2.8	NO	4.5
- 6th market	US	2.1	LV	3.4

1) Data for 2000 not available.

4.2.7 Ireland

Ireland is both a country of origin for international tourism and a destination. In particular, it has one of the highest outbound tourism rates in Europe, along with the Netherlands. Even if lower in absolute values, outbound tourism has grown faster than inbound tourism in recent years, brought on by both the improvement of the economy and the increase in low-cost flights.

Table 4.2.7.1 - Main tourism indicators: Ireland in 2000 and 2006

Indicators	2000	2006
- Share of international nights in the country as a proportion of total international nights in the EU-27	2.3%	2.3%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-27	1.3%	1.7%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	:	:
- Proportion of international tourism nights compared with total tourism nights in the country	69.2%	64.3%
- Proportion of international tourism receipts in GDP	2.7%	2.4%
- Ratio of international tourism receipts to expenditure	1.04	0.78

In 2006, the country accounted for 2.3% (no change compared with 2000) of total international nights spent in the EU-27 area and 1.7% of international tourism receipts (1.3% in 2000, Table 4.2.7.1). This indicates that there is still a span between the profit margin on incoming tourism and the volume of incoming tourism, but with a positive trend for the profit margin to make up for the gap. International tourists spent about 64% of total tourism nights in the country (about 69% in 2000).

In 2006, the contribution of international tourism receipts to the country's GDP was 2.4% (2.7% in 2000) and receipts amounted to 78% of expenditure (104% in 2000), meaning that expenditure by Irish tourists abroad still exceeded the gains from inbound tourism significantly, albeit with a falling trend.

The following spider plot summarises the evolution of the global tourism performance of Ireland in 2000 and 2006, according to the six indicators considered above.

4

Figure 4.2.7 - Situation of tourism in Ireland in 2000 and 2006

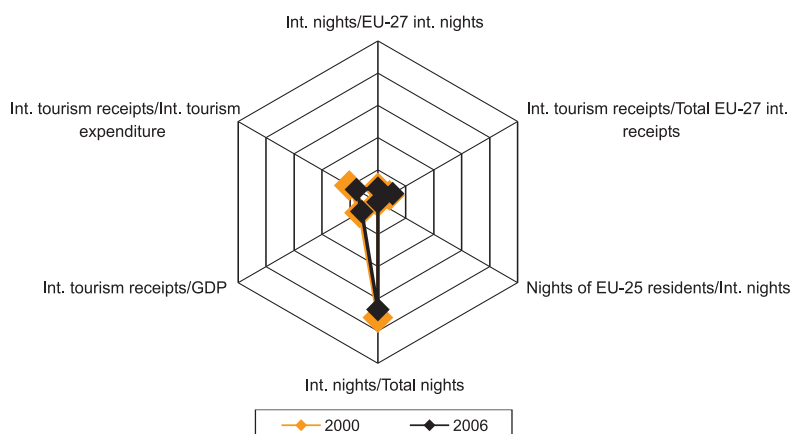


Table 4.2.7.2 - Main tourism markets in Ireland - nights spent by non-residents (as % of total nights), 2000 and 2006

Markets	2000		2006	
	Country	%	Country	%
- 1st market	:	:	:	:
- 2nd market	:	:	:	:
- 3rd market	:	:	:	:
- 4th market	:	:	:	:
- 5th market	:	:	:	:
- 6th market	:	:	:	:

COUNTRY DESCRIPTION

4.2.8 Greece

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

Table 4.2.8.1 - Main tourism indicators: Greece in 2000 and 2006

Indicators	2000	2006
- Share of international nights in the country as a proportion of total international nights in the EU-27	5.3%	4.5%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-27	4.6%	4.3%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	83.1%	80.4%
- Proportion of international tourism nights compared with total tourism nights in the country	75.6%	74.5%
- Proportion of international tourism receipts in GDP	7.3%	5.2%
- Ratio of international tourism receipts to expenditure	2.03	4.51

The country absorbs a significant amount of international tourism. In 2006, nights spent by international tourists in Greece accounted for 4.5% of total international nights spent within the EU-27 area (5.3% in 2000, Table 4.2.8.1). Similarly, the share of international tourism receipts was about 4.3% (4.6% in 2000). International tourism is prevalent. In 2006, non-resident tourists generated almost three quarters of total tourism nights (75.6% in 2000). Tourists coming from the EU-25 area spent about 80% of them (about 83% in 2000).

Germany, as the primary market of origin, accounted for 21.2% of total nights, against 30.7% in 2000. The United Kingdom ranked second with 16.7% (17.6% in 2000), followed by Italy (7.5%), France (6.1%), the Netherlands (5.8%) and Austria (3.9%). Altogether, these markets

accounted for more than 61% of total international nights (about 69% in 2000, Table 4.2.8.2).

Tourism contributes significantly to the local economy. In 2006, international tourism receipts accounted for about 5.2% of total GDP (7.3% in 2000) and was more than four times higher than tourism expenditure (203% in 2000). This means that expenditure by non-resident tourists in the country was well above expenditure by Greek tourists abroad.

The following spider plot summarises the evolution of the global tourism performance of Greece in 2000 and 2006, according to the six indicators considered above.

Figure 4.2.8 - Situation of tourism in Greece in 2000 and 2006

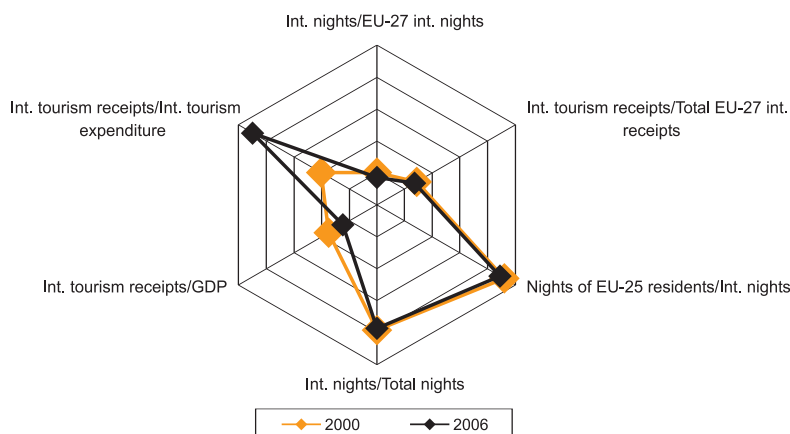


Table 4.2.8.2 - Main tourism markets in Greece - nights spent by non-residents (as % of total nights), 2000 and 2006

Markets	2000		2006	
	Country	%	Country	%
- 1st market	DE	30.7	DE	21.2
- 2nd market	UK	17.6	UK	16.7
- 3rd market	IT	5.8	IT	7.5
- 4th market	FR	4.9	FR	6.1
- 5th market	NL	4.9	NL	5.8
- 6th market	AT	4.6	AT	3.9

4.2.9 Spain

Spain is one of the main tourism destinations in the world and is the best performer within the EU-27. It is also growing as a country of origin of international tourism. Outbound tourism flows show an interesting trend, resulting from the country's economic prosperity and the increase in low-cost flights.

Table 4.2.9.1 - Main tourism indicators: Spain in 2000 and 2006

Indicators	2000	2006
- Share of international nights in the country as a proportion of total international nights in the EU-27	26.2%	23.5%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-25	14.9%	16.0%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	90.3%	88.8%
- Proportion of international tourism nights compared with total tourism nights in the country	67.9%	59.2%
- Proportion of international tourism receipts in GDP	5.1%	4.2%
- Ratio of international tourism receipts to expenditure	5.03	3.07

In 2006, the country accounted for about 23% of total international nights spent within the EU-27 area (about 26% in 2000) and 16.0% of international tourism receipts (14.9% in 2000, Table 4.2.9.1). This results in a relatively low average receipt per night in comparison to other EU-27 countries, i.e. the profit margin on incoming tourism is lower than the volume of incoming tourism. Non-resident tourists spent 59.2% of total nights in the country (67.9% in 2000). Almost 89% of these nights were recorded for tourists coming from EU-25 countries (little more than 90% in 2000). This highlights the strong influence of intra-area tourism on the national market.

The United Kingdom and Germany are the main markets of origin, accounting together for about 58% of total international nights in 2006 (about 61% in 2000). France ranked third with 6.2% (5.1% in 2000), followed by the Netherlands (5.6%), Italy (4.4%) and Belgium (3.1%). These

countries together represented about 77% of total international nights spent in Spain (about 79% in 2000, Table 4.2.9.2).

In 2006, the contribution of international tourism receipts to the country's GDP was relatively high compared to other EU-27 countries (4.2% against 5.1% in 2000). Looking at the ratio of international tourism receipts to expenditure, in 2006 it was 3.1 against 5.0 in 2000. Although the balance is still positive, the decline derives from both a decrease in expenditure by international tourists in the country and a corresponding upturn of expenses by Spanish tourists abroad. This confirms that Spain is growing as a country of origin of international tourism.

The following spider plot summarises the overall tourism performance of Spain in 2000 and 2006, according to the six indicators considered above.

Figure 4.2.9 - Situation of tourism in Spain in 2000 and 2006

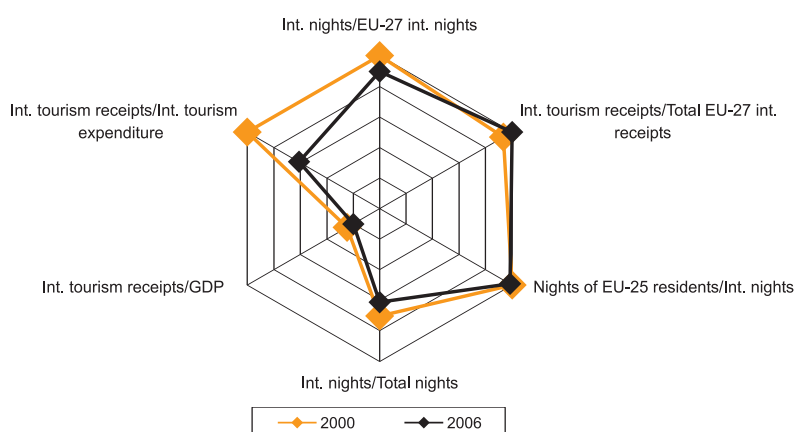


Table 4.2.9.2 - Main tourism markets in Spain - nights spent by non-residents (as % of total nights), 2000 and 2006

Markets	2000		2006	
	Country	%	Country	%
- 1st market	UK	31.3	UK	31.1
- 2nd market	DE	29.9	DE	26.8
- 3rd market	NL	6.2	FR	6.2
- 4th market	FR	5.1	NL	5.6
- 5th market	BE	3.4	IT	4.4
- 6th market	IT	3.2	BE	3.1

COUNTRY DESCRIPTION

4.2.10 France

Along with Spain, France is one of the main tourism destinations in the world. It is also one of the main generators of tourism, primarily within the country itself but also abroad.

Table 4.2.10.1 - Main tourism indicators: France in 2000 and 2006

Indicators	2000	2006
- Share of international nights in the country as a proportion of total international nights in the EU-27	12.3%	11.1%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-27	15.3%	14.5%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	73.0%	76.8%
- Proportion of international tourism nights compared with total tourism nights in the country	38.5%	35.6%
- Proportion of international tourism receipts in GDP	2.3%	2.1%
- Ratio of international tourism receipts to expenditure	1.73	1.49

In 2006, the country accounted for about 11% of total international tourism nights spent within the EU-27 area (more than 12% in 2000) and 14.5% of total international receipts in the same area (15.3% in 2000, Table 4.2.10.1). In spite of France's international popularity, the share of international tourism nights as a proportion of total tourism nights in the country (35.6% in 2006 versus 38.5% in 2000) is low compared to Greece and Spain, because of the high proportion of domestic tourism. However, the share of nights spent by tourists who are resident in the EU-25 area was 76.8% (73.0% in 2000). This confirms the strong influence of intra-area tourism on the national market.

The United Kingdom, as the main country of origin, accounted for almost 21% of total international nights. The Netherlands with 17.5%, Germany with 12.2% and Belgium with 8.0% followed (15.7%, 13.5% and 7.2%

respectively in 2000). Italy and the United States ranked fifth and sixth with shares of 7.8% and 6.7%. Altogether, the six main markets covered 72.7% of total international nights in France (Table 4.2.10.2).

The contribution of international tourism receipts to the country's GDP is low (2.1% in 2006, 2.3% in 2000) in comparison to Spain and Greece. The ratio of international tourism receipts to expenditure (1.5 in 2006 versus 1.7 in 2000) also shows a lower value than in the two other countries. This latter figure confirms that France is not only one of the most important tourism destinations, but that it is also growing as one of the main countries of origin of international tourism.

The following spider plot summarises the overall tourism performance of France in 2000 and 2006, according to the six indicators considered above.

Figure 4.2.10 - Situation of tourism in France in 2000 and 2006

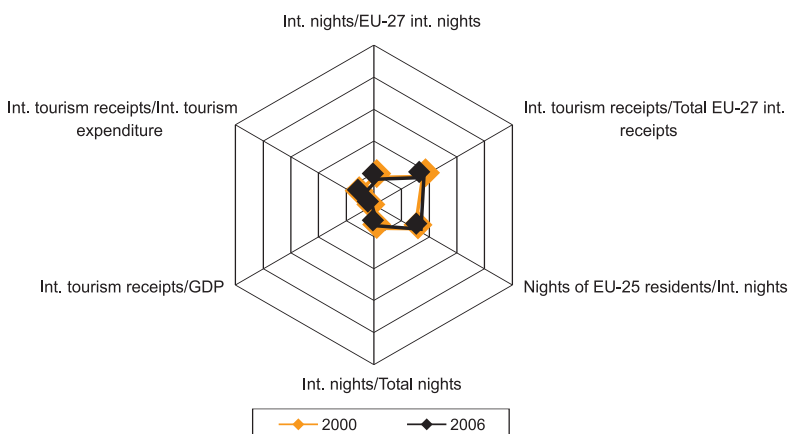


Table 4.2.10.2 - Main tourism markets in France - nights spent by non-residents (as % of total nights), 2000 and 2006

Markets	2000		2006	
	Country	%	Country	%
- 1st market	UK	20.0	UK	20.5
- 2nd market	NL	15.7	NL	17.5
- 3rd market	DE	13.5	DE	12.2
- 4th market	US	9.4	BE	8.0
- 5th market	IT	8.2	IT	7.8
- 6th market	BE	7.2	US	6.7

4.2.11 Italy

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

Table 4.2.11.1 - Main tourism indicators: Italy in 2000 and 2006

Indicators	2000	2006
- Share of international nights in the country as a proportion of total international nights in the EU-27	15.7%	16.4%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-27	13.8%	11.9%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	75.0%	70.9%
- Proportion of international tourism nights compared with total tourism nights in the country	41.4%	42.8%
- Proportion of international tourism receipts in GDP	2.5%	2.1%
- Ratio of international tourism receipts to expenditure	1.76	1.66

In 2006, the country accounted for 16.4% of total international nights spent within the EU-27 area (15.7% in 2000) and 11.9% of international tourism receipts (13.8% in 2000, Table 4.2.11.1). This results in a rather low average receipt per night in comparison to other EU-27 destinations and shows that the profit margin of incoming tourism was lower than the volume of incoming tourism. Non-resident tourists spent about 43% of total tourism nights in the country (about 41% in 2000). More than 70% of these nights were recorded for tourists from the EU-25 area (75.0% in 2000).

Germany, as the main country of origin, accounted for almost a quarter of total international nights (37.3% in 2000). The United Kingdom occupied second place (8.1% versus 6.8% in 2000), followed by the United States (7.7% versus 6.7%), France (6.3%), the Netherlands (5.7%) and

Austria (4.9%). Altogether, the six main markets covered 62.3% of total international nights in Italy (67.9% in 2000, Table 4.2.11.2).

As for France, the contribution of international tourism receipts to the country's GDP is low (2.1% in 2006 versus 2.5% in 2000) in comparison to Spain and Greece. This is also the case for the ratio of international tourism receipts to expenditure (1.7 in 2006 against 1.8 in 2000). This latter figure confirms that Italy is not only one of the most important tourism destinations, but that it is also growing as one of the main countries of origin of international tourism.

The following spider plot summarises the overall tourism performance of Italy in 2000 and 2006, according to the six indicators considered above.

Figure 4.2.11 - Situation of tourism in Italy in 2000 and 2006

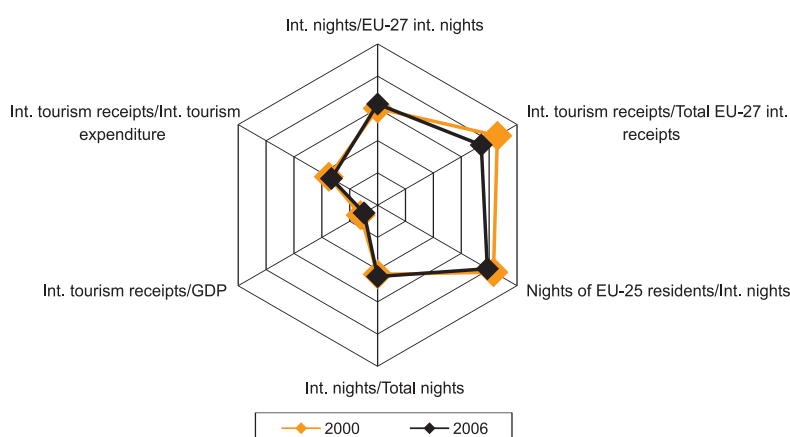


Table 4.2.11.2 - Main tourism markets in Italy - nights spent by non-residents (as % of total nights), 2000 and 2006

Markets	2000		2006	
	Country	%	Country	%
- 1st market	DE	37.3	DE	29.6
- 2nd market	UK	6.8	UK	8.1
- 3rd market	US	6.7	US	7.7
- 4th market	FR	6.5	FR	6.3
- 5th market	AT	5.9	NL	5.7
- 6th market	NL	4.7	AT	4.9

COUNTRY DESCRIPTION

4.2.12 Cyprus

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

Table 4.2.12.1 - Main tourism indicators: Cyprus in 2000 and 2006

Indicators	2000	2006
- Share of international nights in the country as a proportion of total international nights in the EU-27	1.9%	1.4%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-27	1.0%	0.8%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	82.7%	84.0%
- Proportion of international tourism nights compared with total tourism nights in the country	96.5%	92.2%
- Proportion of international tourism receipts in GDP	20.8%	13.2%
- Ratio of international tourism receipts to expenditure	4.69	2.45

In 2006, the island accounted for 1.4% of international tourism nights spent in the EU-27 (1.9% in 2000) and less than 1% of international tourism receipts (Table 4.2.12.1). The local tourism market is dominated by international tourism. In 2006, nights spent by non-residents amounted to 92.2% of total nights in the country (96.5% in 2000). 84.0% of these nights were recorded for tourists coming from the EU-25 area (82.7% in 2000), confirming the strong influence of intra-area tourism on the national market.

Tourists from the United Kingdom represented the first market, covering more than half of total international tourism nights spent on the island. Germany ranked second (8.9% in 2006 against 12.2% in 2000), followed by Sweden (5.5%), Norway (3.5%), Switzerland (2.0%) and France (1.9%, Table 4.2.12.2).

International tourism makes an important contribution to the local economy. In 2006, tourism receipts accounted for 13.2% of total GDP (20.8% in 2000) and represented more than twice the amount of tourism expenditure (4.7 in 2000). This means that inbound tourism was much higher than outbound tourism.

The following spider plot summarises the overall tourism performance of Cyprus in 2000 and 2006, according to the six indicators considered above.

Figure 4.2.12 - Situation of tourism in Cyprus in 2000 and 2006

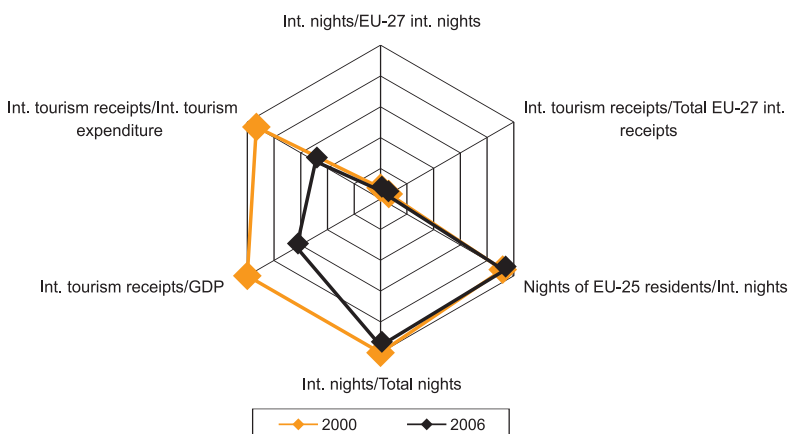


Table 4.2.12.2 - Main tourism markets in Cyprus - nights spent by non-residents (as % of total nights), 2000 and 2006

Markets	2000		2006	
	Country	%	Country	%
- 1st market	UK	53.3	UK	55.4
- 2nd market	DE	12.2	DE	8.9
- 3rd market	SE	5.3	SE	5.5
- 4th market	CH	3.8	NO	3.5
- 5th market	NO	2.6	CH	2.0
- 6th market	NL	2.2	FR	1.9

4.2.13 Latvia

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

Table 4.2.13.1 - Main tourism indicators: Latvia in 2000 and 2006

Indicators	2000	2006
- Share of international nights in the country as a proportion of total international nights in the EU-27	0.1%	0.2%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-27	0.1%	0.2%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country ¹	44.3%	69.6%
- Proportion of international tourism nights compared with total tourism nights in the country	47.0%	60.1%
- Proportion of international tourism receipts in GDP	1.7%	2.5%
- Ratio of international tourism receipts to expenditure	0.53	0.69

1) For 2000, share of nights spent by EU-15 residents.

Like Estonia, Latvia's attractiveness within the EU-27 area is still low. In 2006, the country recorded less than 0.5% for both total international nights and total international tourism receipts within the EU-27 (Table 4.2.13.1). However, the impact of international tourism is lower than in Estonia, even if it is growing fast in comparison to 2000. In 2006, the share of foreign nights as a proportion of total tourism nights in the country amounted to 60.1% (47.0% in 2000), with tourists coming from the EU-25 area, in particular from neighbouring countries, accounting for almost 70% of these nights.

Germany, as the main market of origin, accounted for almost 13% of total tourism nights. Finland ranked second with 10.0%, followed by the United Kingdom (9.2%), Estonia and Lithuania (7.2% each) and Norway (6.5%). In

total, the six main markets covered more than 50% of total international tourism nights (Table 4.2.13.2).

In contrast to Estonia, however, tourism contributes little to the local economy in comparison to other economic sectors. In 2006, international tourism receipts accounted for 2.5% of total GDP (1.7% in 2000) and represented about 69% of tourism expenditure (about 53% in 2000). This means that expenditure by Latvian tourists abroad was higher than expenditure by non-resident tourists in Latvia.

The following spider plot summarises the overall tourism performance of Latvia in 2000 and 2006, according to the six indicators considered above.

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Figure 4.2.13 - Situation of tourism in Latvia in 2000 and 2006

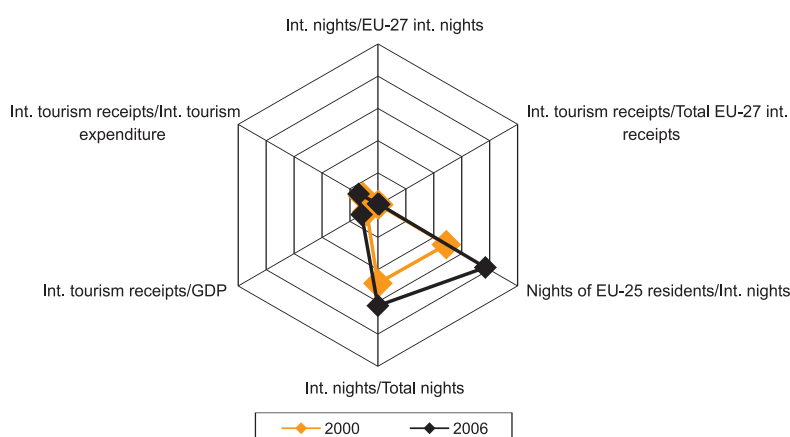


Table 4.2.13.2 - Main tourism markets in Latvia - nights spent by non-residents (as % of total nights), 2003 and 2006

Markets	2003 ¹		2006	
	Country	%	Country	%
- 1st market	DE	13.1	DE	12.7
- 2nd market	FI	12.3	FI	10.0
- 3rd market	UK	5.5	UK	9.2
- 4th market	SE	5.3	LT	7.2
- 5th market	US	3.8	EE	7.2
- 6th market	NO	2.9	NO	6.5

1) Data for 2000 not available.

COUNTRY DESCRIPTION

4.2.14 Lithuania

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

Table 4.2.14.1 - Main tourism indicators: Lithuania in 2000 and 2006

Indicators	2000	2006
- Share of international nights in the country as a proportion of total international nights in the EU-27	0.1%	0.2%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-27	0.2%	0.3%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country ¹	46.4%	69.7%
- Proportion of international tourism nights compared with total tourism nights in the country	45.2%	51.6%
- Proportion of international tourism receipts in GDP	3.5%	3.5%
- Ratio of international tourism receipts to expenditure	1.56	1.14

1) For 2000, share of nights spent by EU-15 residents.

In 2006, the country recorded less than 0.5% for both total international nights and total international tourism receipts within the EU-27 (Table 4.2.14.1). In Lithuania, domestic tourism was more prevalent in comparison to Estonia and Latvia. Non-resident tourists spent only about 52% of the country's total tourism nights (about 45% in 2000). However, tourists coming from the EU-25 area spent around 70% of these nights. This indicates the strong influence of intra-area tourism on the national market.

As for Latvia, Germany was the main market of origin, accounting for 15.7% of total tourism nights (17.1% in 2002). Poland ranked second with 13.4% (14.3% in 2000), followed by the United Kingdom (5.8%), Latvia (5.4%), Finland (4.3%) and Italy (3.8%). Altogether, the six main markets covered 48.4% of total international tourism nights

(47.7% in 2000), with Latvia ranking in the top six for the first time in 2006 (Table 4.2.14.2).

International tourism contributed less to the local economy than in Estonia. In 2006, international tourism receipts accounted for about 3.5% of total GDP, but was only 1.1 times higher than tourism expenditures (1.6 in 2000). This means that expenditure by non-resident tourists in the country was well above expenditure by Lithuanian tourists abroad.

The following spider plot summarises the overall tourism performance of Lithuania in 2000 and 2006, according to the six indicators considered above.

Figure 4.2.14 - Situation of tourism in Lithuania in 2000 and 2006

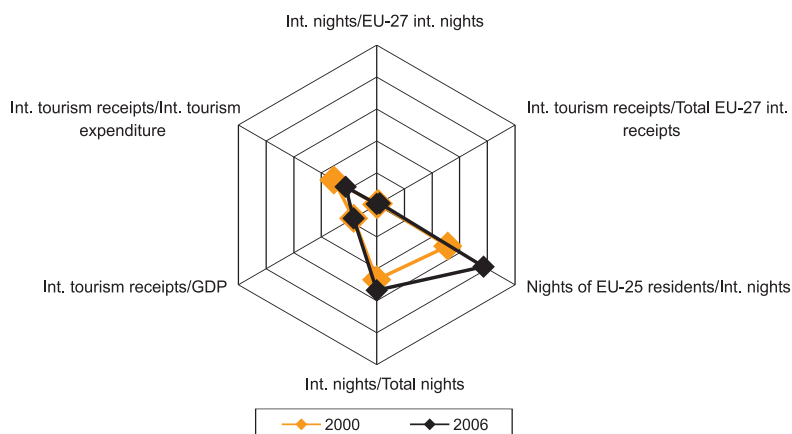


Table 4.2.14.2 - Main tourism markets in Lithuania - nights spent by non-residents (as % of total nights), 2002 and 2006

Markets	2002 ¹		2006	
	Country	%	Country	%
- 1st market	DE	17.1	DE	15.7
- 2nd market	PL	14.3	PL	13.4
- 3rd market	US	4.4	UK	5.8
- 4th market	FI	4.2	LV	5.4
- 5th market	UK	4.2	FI	4.3
- 6th market	SE	3.5	IT	3.8

1) Data for 2000 not available.

4.2.15 Luxembourg

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

Table 4.2.15.1 - Main tourism indicators: Luxembourg in 2000 and 2006

Indicators	2000	2006
- Share of international nights in the country as a proportion of total international nights in the EU-27	0.3%	0.3%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-27 ¹	1.2%	1.1%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	89.9%	90.3%
- Proportion of international tourism nights compared with total tourism nights in the country	91.6%	91.9%
- Proportion of international tourism receipts ¹ in GDP	11.6%	8.5%
- Ratio of international tourism receipts to expenditure ¹	1.24	1.16

1) 2002 data used for 2000.

The prevalence of short-stay business tourism explains why the capacity of the country to accommodate international tourists is lower than its tourism gains within the EU-27 area. In 2006, Luxembourg recorded only 0.3% of total international nights spent in the EU-27 and little more than 1% of international tourism receipts (Table 4.2.15.1). This means that the profit margin on incoming tourism was higher than the volume of incoming tourism. In 2006, almost all tourist nights in the country were recorded for foreign tourists (90.3%). Residents in the EU-25 area generated about 92% of this amount.

Looking at the six main markets of origin, the Netherlands ranked first, accounting for 38.4% of total international tourism nights (39.1% in 2000). Belgium was second with 19.5% (22.6% in 2000), followed by Germany (10.4%), France (7.8%), the United Kingdom (5.1%) and the United

States (2.3%). Altogether, tourists from these countries accounted for about 84% of total international nights in Luxembourg (about 86% in 2000, Table 4.2.15.2).

Business tourism made an important contribution to the local economy. The proportion of international tourism receipts in the country's GDP amounted to 8.5% in 2006 (against 11.6% in 2002) and the ratio of receipts to expenditure, which measures the tourism balance, was 116% (124% in 2000). This means that expenditure by foreign tourists in the country largely exceeded expenditure by domestic tourists abroad.

The following spider plot summarises the overall tourism performance of Luxembourg in 2000 and 2006, according to the six indicators considered above.

Figure 4.2.15 - Situation of tourism in Luxembourg in 2000 and 2006

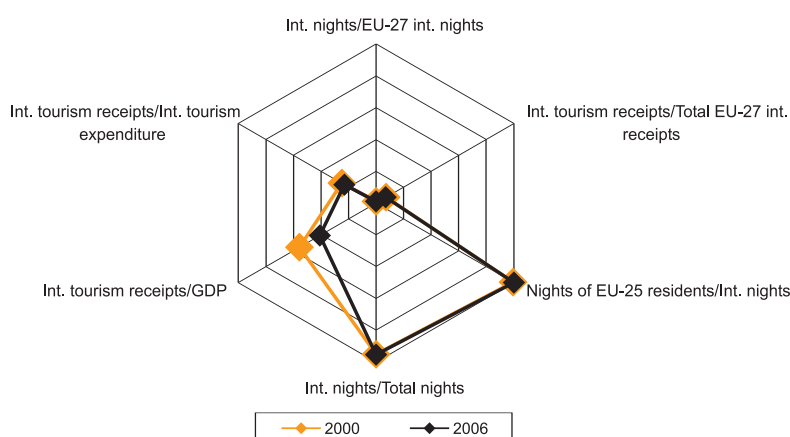


Table 4.2.15.2 - Main tourism markets in Luxembourg - nights spent by non-residents (as % of total nights), 2000 and 2006

Markets	2000		2006	
	Country	%	Country	%
- 1st market	NL	39.1	NL	38.4
- 2nd market	BE	22.6	BE	19.5
- 3rd market	DE	9.1	DE	10.4
- 4th market	FR	6.2	FR	7.8
- 5th market	UK	5.6	UK	5.1
- 6th market	US	3.1	US	2.3

COUNTRY DESCRIPTION

4.2.16 Hungary

Hungary with its capital Budapest attracts both resident tourists and international tourists, mainly from central Europe.

Table 4.2.16.1 - Main tourism indicators: Hungary in 2000 and 2006

Indicators	2000	2006
- Share of international nights in the country as a proportion of total international nights in the EU-27	1.3%	1.1%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-27	1.9%	1.4%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country ¹	70.3%	72.9%
- Proportion of international tourism nights compared with total tourism nights in the country	54.9%	51.1%
- Proportion of international tourism receipts in GDP	7.8%	4.0%
- Ratio of international tourism receipts to expenditure	2.27	1.72

1) For 2000, share of nights spent by EU-15 residents.

In 2006, the country accounted for 1.1% of total international nights spent in the EU-27 area (1.3% in 2000) and 1.4% of international tourism receipts (1.9% in 2000, Table 4.2.16.1). This means that the profit margin on incoming tourism was a little higher than the volume of incoming tourism. International tourists spent about 51% of total nights (about 55% in 2000). Tourists coming from the EU-25 area spent 72.9% of these nights. This shows the strong influence of intra-area tourism on the national market.

Looking at the six main markets of origin, Germany ranked first with 28.0% (40.3% in 2001), followed by the United Kingdom (7.3%), Austria (7.1%), the United States (5.4%), Italy (5.2%) and Spain (3.4%). Altogether, these countries accounted for about 56% of total international tourism

nights in Hungary (around 64% in 2001). Compared to 2001, the United Kingdom and Spain replaced the Netherlands and Poland (Table 4.2.16.2).

The contribution of international tourism receipts to the country's GDP amounted to 4.0% in 2006 (7.8% in 2000), while receipts exceeded expenditure by 1.7 times (2.3 in 2000). This indicates that expenditure by foreign tourists in the country were well above expenditure by Hungarian tourists abroad.

The following spider plot summarises the overall tourism performance of Hungary in 2000 and 2006, according to the six indicators considered above.

Figure 4.2.16 - Situation of tourism in Hungary in 2000 and 2006

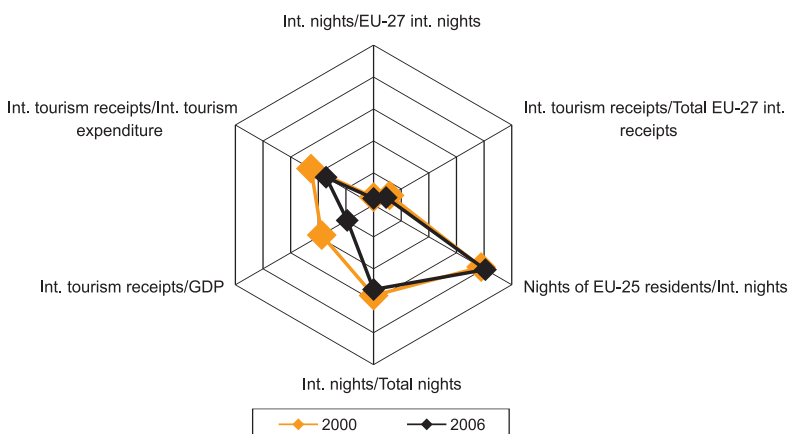


Table 4.2.16.2 - Main tourism markets in Hungary - nights spent by non-residents (as % of total nights), 2001 and 2006

Markets	2001 ¹		2006	
	Country	%	Country	%
- 1st market	DE	40.3	DE	28.0
- 2nd market	AT	6.6	UK	7.3
- 3rd market	NL	4.8	AT	7.1
- 4th market	IT	4.5	US	5.4
- 5th market	US	3.9	IT	5.2
- 6th market	PL	3.8	ES	3.4

1) Data for 2000 not available.

4.2.17 Malta

Like Cyprus, the island of Malta is mainly a destination of international tourism, in terms of the six indicators considered above.

Table 4.2.17.1 - Main tourism indicators: Malta in 2000 and 2006

Indicators	2000	2006
- Share of international nights in the country as a proportion of total international nights in the EU-27	:	0.7%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-27	0.3%	0.2%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	:	87.4%
- Proportion of international tourism nights compared with total tourism nights in the country	:	95.7%
- Proportion of international tourism receipts in GDP	15.7%	12.1%
- Ratio of international tourism receipts to expenditure	3.06	2.40

In 2006, less than 1% of total international tourism nights in the EU-27 area were spent on the island and the corresponding receipts amounted to only 0.2% of the EU-27 total (Table 4.2.17.1). Tourism demand is almost entirely generated by non-resident tourists (about 96% of total nights in the country), in particular those coming from the EU-25 area (more than 87% of international nights). This means that Malta is strongly influenced by intra-area tourism.

The United Kingdom, as the main market of origin, accounted for about 42% of international tourism nights in 2006 (about 39% in 2000). Germany ranked second with 11.6% (18.3% in 2000), followed by Italy (7.4% versus 5.4%), France (6.3%), the Netherlands (3.3%) and Belgium (2.6%, Table 4.2.17.2).

As in the case of Cyprus, international tourism contributes significantly to the local economy. In 2006, tourism receipts accounted for about 12.1% of total GDP (15.7% in 2000) and was 2.4 times higher than tourism expenditure (3.1 in 2000). This means that expenditure by foreign tourists in the country largely exceeded expenditure by domestic tourists abroad.

The following spider plot summarises the overall tourism performance of Malta in 2000 and 2006, according to the six indicators considered above.

Figure 4.2.17 - Situation of tourism in Malta in 2000 and 2006

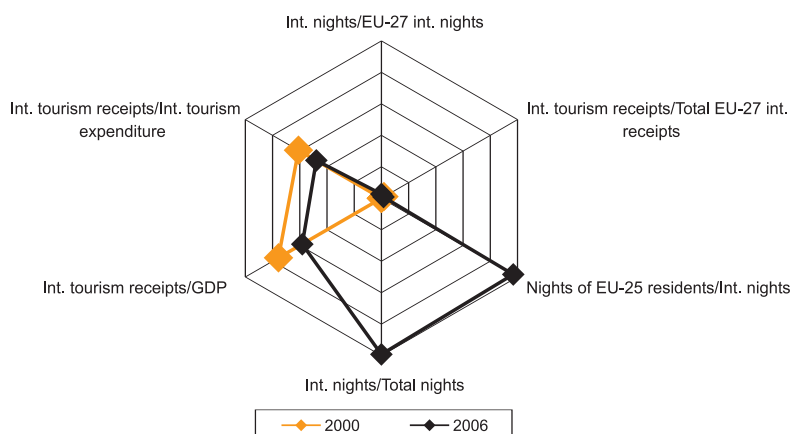


Table 4.2.17.2 - Main tourism markets in Malta - nights spent by non-residents (as % of total nights), 2000 and 2006

Markets	2000		2006	
	Country	%	Country	%
- 1st market	UK	38.7	UK	42.4
- 2nd market	DE	18.3	DE	11.6
- 3rd market	FR	6.3	IT	7.4
- 4th market	NL	5.6	FR	6.3
- 5th market	IT	5.5	NL	3.3
- 6th market	BE	2.4	BE	2.6

COUNTRY DESCRIPTION

4.2.18 The Netherlands

Like Denmark, the Netherlands is a generator of tourism, both within the country and abroad. In addition, it has one of the highest outbound tourism rates in Europe, which has grown constantly in recent years.

Table 4.2.18.1 - Main tourism indicators: The Netherlands in 2000 and 2006

Indicators	2000	2006
- Share of international nights in the country as a proportion of total international nights in the EU-27	2.9%	2.8%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-27	3.6%	3.6%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	81.7%	80.1%
- Proportion of international tourism nights compared with total tourism nights in the country	31.9%	32.0%
- Proportion of international tourism receipts in GDP	1.9%	1.7%
- Ratio of international tourism receipts to expenditure	0.59	0.67

In 2006, the country recorded 2.8% of total international tourism nights spent in the EU-27 and 3.6% of total international tourism receipts in the area (Table 4.2.18.1). This means that the profit margin of incoming tourism was higher than the volume of incoming tourism. As in the case of Denmark, the market is dominated by domestic tourism. International tourism nights accounted for only 32% of total nights in the country. This share has remained stable since 2000. Tourists who are residents of EU-25 countries spent about 80% of those nights (around 82% in 2000).

Tourists from Germany were the primary market (39.5% of total nights spent by non-residents), followed by the United Kingdom (13.9%), Belgium (9.5%), the United States (6.7%), France (4.6%) and Italy (3.2%). Altogether, tourists coming from the six main markets accounted for about 77%

of total international nights spent in the Netherlands (about 82% in 2000, Table 4.2.18.2).

The contribution of international tourism to the country's GDP was low in comparison to other economic sectors (1.7% in 2006 against 1.9% in 2000). The ratio of international tourism receipts to expenditure, which measures the tourism balance, was 0.7 in 2006 (0.6 in 2000). This means that expenditure by Dutch tourists abroad was higher than expenditure by non-resident tourists in the country.

The following spider plot summarises the overall tourism performance of the Netherlands in 2000 and 2006, according to the six indicators considered above.

Figure 4.2.18 - Situation of tourism in the Netherlands in 2000 and 2006

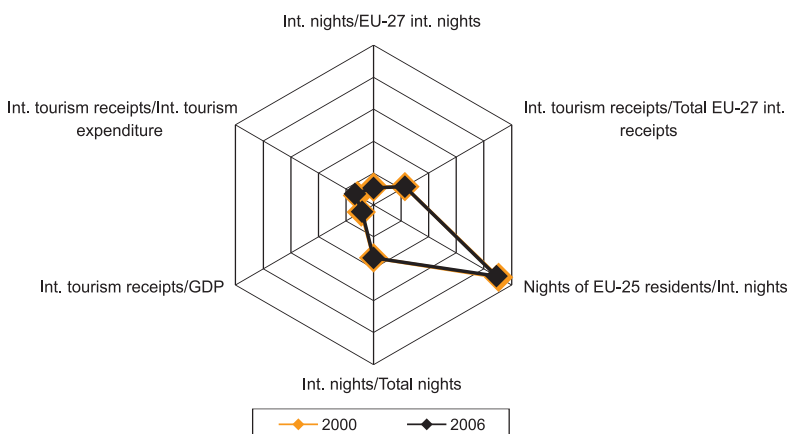


Table 4.2.18.2 - Main tourism markets in the Netherlands - nights spent by non-residents (as % of total nights), 2000 and 2006

Markets	2000		2006	
	Country	%	Country	%
- 1st market	DE	45.1	DE	39.5
- 2nd market	UK	15.3	UK	13.9
- 3rd market	US	7.6	BE	9.5
- 4th market	BE	7.3	US	6.7
- 5th market	FR	4.0	FR	4.6
- 6th market	IT	3.1	IT	3.2

4.2.19 Austria

Austria is one of the most important tourism destinations in Europe, especially for cultural and mountain tourism. However, it has also increasingly been a generator of tourism abroad in recent years.

Table 4.2.19.1 - Main tourism indicators: Austria in 2000 and 2006

Indicators	2000	2006
- Share of international nights in the country as a proportion of total international nights in the EU-27	7.2%	7.3%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-27	5.0%	5.2%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	87.6%	86.1%
- Proportion of international tourism nights compared with total tourism nights in the country	71.1%	71.4%
- Proportion of international tourism receipts in GDP	5.1%	5.1%
- Ratio of international tourism receipts to expenditure	1.17	1.79

In 2006, about 7% of total international tourism nights in the EU-27 were spent in Austria, which collected only 5.2% of the corresponding receipts (Table 4.2.19.1). This means that the profit margin on incoming tourism was lower than the volume of incoming tourism. Non-resident tourists accounted for more than 71% of total nights. Tourists from the EU-25 area spent about 86% of total international nights. This shows the strong influence of intra-area tourism on the national market.

Among the six main markets of origin, Germany ranked first with more than a half of total international tourism nights (60.1% in 2000). The other five countries accounted for 26.0% of total nights (23.3% in 2000). In 2006, the Netherlands held second position (9.4%), followed by the

United Kingdom (5.0%), Switzerland (4.6%), Italy (4.1%) and Belgium (2.9%).

International tourism contributed substantially to the country's economy. The proportion of international tourism receipts in total GDP was 5.1% in 2006 and receipts were 1.8 times expenditure (1.2 in 2000), meaning that gains from incoming tourism were higher than expenditure by outbound tourists.

The following spider plot summarises the overall tourism performance of Austria in 2000 and 2006, according to the six indicators discussed above.

4

Figure 4.2.19 - Situation of tourism in Austria in 2000 and 2006

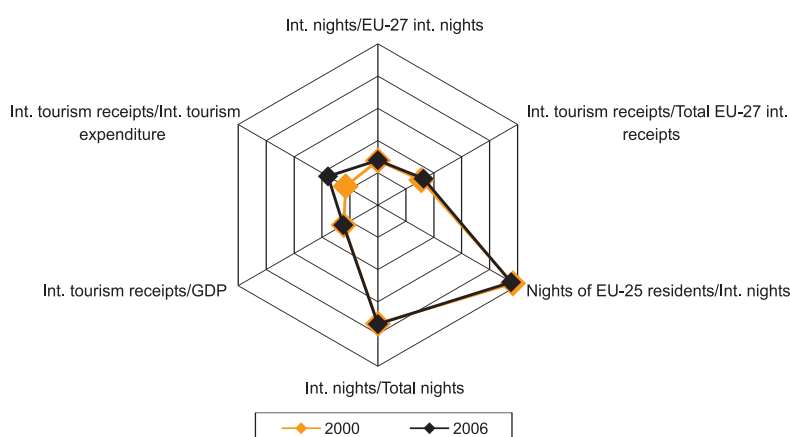


Table 4.2.19.2 - Main tourism markets in Austria - nights spent by non-residents (as % of total nights), 2000 and 2006

Markets	2000		2006	
	Country	%	Country	%
- 1st market	DE	60.1	DE	52.9
- 2nd market	NL	8.4	NL	9.4
- 3rd market	UK	4.5	UK	5.0
- 4th market	CH	4.0	CH	4.6
- 5th market	IT	3.6	IT	4.1
- 6th market	US	2.8	BE	2.9

COUNTRY DESCRIPTION

4.2.20 Poland

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

Table 4.2.20.1 - Main tourism indicators: Poland in 2000 and 2006

Indicators	2000	2006
- Share of international nights in the country as a proportion of total international nights in the EU-27	0.8%	1.1%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-27	2.9%	2.3%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country ¹	66.1%	76.0%
- Proportion of international tourism nights compared with total tourism nights in the country	14.1%	20.6%
- Proportion of international tourism receipts in GDP	3.3%	2.1%
- Ratio of international tourism receipts to expenditure	1.72	1.26

1) For 2000, 2001 data is used.

In 2006, Poland accounted for 1.1% of total international tourism nights spent in the EU-27 and 2.3% of international tourism receipts in the same area. This means that the profit margin on incoming tourism was higher than the volume of incoming tourism (Table 4.2.20.1). Domestic tourists spent the largest share of tourism nights in all accommodation establishments. In 2006, nights spent by non-residents amounted to only about 21% of total nights (about 14% in 2000). Tourists from EU-25 countries accounted for about three quarters of these nights. The increase in this share in comparison to 2001 (66.1%) indicates the growing influence of intra-area tourism on the national market.

Similar to other eastern European destinations, Germany was the primary market of origin, accounting for more than two-fifths of total international tourism nights spent in the country (44.2% in 2003). The United Kingdom ranked

second with 7.2% (4.5% in 2003), followed by the United States (4.4%), Italy (4.3%), France (3.8%) and Sweden (2.4%, Table 4.2.20.2).

The contribution of international tourism to the country's GDP is low in comparison to other countries in the same area (2.1% in 2006 versus 3.3% in 2000). However, the tourism balance is positive. The ratio of international tourism receipts to expenditure amounted to 1.3 in 2006 (1.7 in 2000), meaning that expenditure by foreign tourists in the country was much higher than expenditure by Polish tourists abroad.

The following spider plot summarises the overall tourism performance of Poland in 2000 and 2006, according to the six indicators considered above.

Figure 4.2.20 - Situation of tourism in Poland in 2000 and 2006

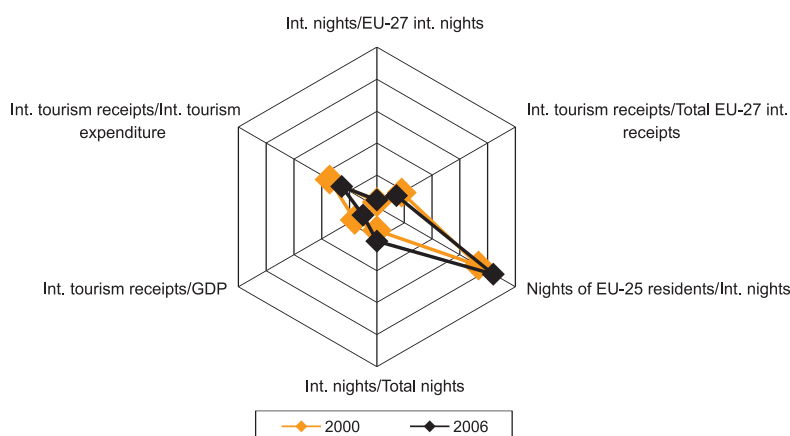


Table 4.2.20.2 - Main tourism markets in Poland - nights spent by non-residents (as % of total nights), 2003 and 2006

Markets	2003 ¹		2006	
	Country	%	Country	%
- 1st market	DE	44.2	DE	41.7
- 2nd market	US	4.5	UK	7.2
- 3rd market	UK	4.5	US	4.4
- 4th market	IT	4.0	IT	4.3
- 5th market	FR	3.9	FR	3.8
- 6th market	DK	2.7	SE	2.4

1) Data for 2000 not available.

4.2.21 Portugal

Like Greece, Portugal is mainly an international tourism destination. This trend has strengthened in recent years.

Table 4.2.21.1 - Main tourism indicators: Portugal in 2000 and 2006

Indicators	2000	2006
- Share of international nights in the country as a proportion of total international nights in the EU-27	2.9%	2.8%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-27	2.6%	2.6%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	86.7%	87.8%
- Proportion of international tourism nights compared with total tourism nights in the country	61.5%	59.0%
- Proportion of international tourism receipts in GDP	4.7%	4.3%
- Ratio of international tourism receipts to expenditure	2.36	2.53

In 2006, Portugal accounted for almost 3% of total international tourism nights spent in the EU-27. The share of tourism receipts was 2.6% (Table 4.2.21.1). This means that the profit margin on incoming tourism was a little lower than the volume of incoming tourism. International tourists spent 59.0% of total nights. Around 88% of these nights were recorded by tourists from EU-25 countries. This indicates that Portugal's tourism market is strongly influenced by intra-area tourism.

As for Spain, the United Kingdom ranked first among the six main markets of origin with 27.9% (28.4% in 2000), followed by Germany with 15.2% (20.7% in 2000), Spain (13.1%), the Netherlands (7.5%), France (5.8%) and Italy (3.8%). Altogether, the first six markets accounted for about 73% of total international nights in 2006 (Table 4.2.21.2).

The contribution of international tourism receipts to the country's GDP was relatively high (4.3% versus 4.7% in 2000) and similar to that of Spain, but Portugal's ratio of tourism receipts to expenditure did not reach the same level (2.5 versus 2.4 in 2000). This means that expenditure by foreign tourists in the country was much higher than expenditure by Portuguese tourists abroad.

The following spider plot summarises the overall tourism performance of Portugal in 2000 and 2006, according to the six indicators considered above.

4

Figure 4.2.21 - Situation of tourism in Portugal in 2000 and 2006

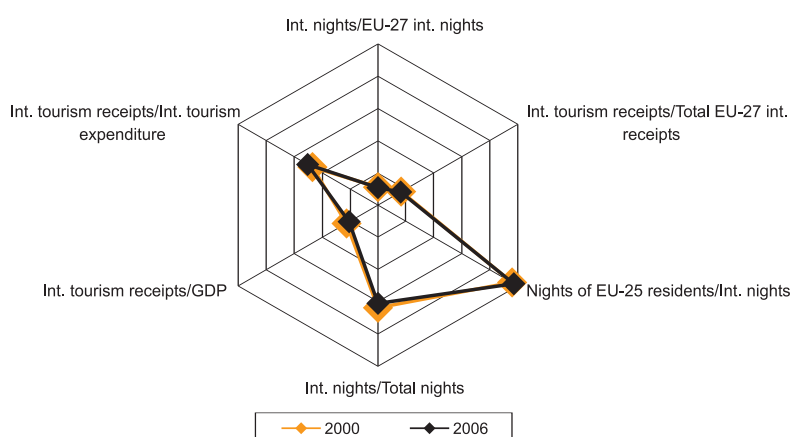


Table 4.2.21.2 - Main tourism markets in Portugal - nights spent by non-residents (as % of total nights), 2000 and 2006

Markets	2000		2006	
	Country	%	Country	%
- 1st market	UK	28.4	UK	27.9
- 2nd market	DE	20.7	DE	15.2
- 3rd market	NL	8.1	ES	13.1
- 4th market	ES	8.0	NL	7.5
- 5th market	FR	5.2	FR	5.8
- 6th market	IT	3.3	IT	3.8

COUNTRY DESCRIPTION

4.2.22 Romania

Tourism in Romania is not yet well developed and depends heavily on domestic demand. International tourism flows in the country are still low and mainly for business purposes.

Table 4.2.22.1 - Main tourism indicators: Romania in 2000 and 2006

Indicators	2000	2006
- Share of international nights in the country as a proportion of total international nights in the EU-27	0.2%	0.3%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-27	0.2%	0.4%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country ¹	56.0%	67.8%
- Proportion of international tourism nights compared with total tourism nights in the country	12.2%	17.1%
- Proportion of international tourism receipts in GDP	1.0%	1.1%
- Ratio of international tourism receipts to expenditure	0.84	1.00

1) For 2000, share of nights spent by EU-15 residents.

In 2006, the country accounted for about 0.3% of total international nights and 0.4% of total international tourism receipts within the EU-27 (Table 4.2.22.1). The weight of international tourism is equally low. In 2006, international tourists only spent 17.1% of total nights (12.2% in 2000). Tourists coming from EU-25 countries generated 67.8% of these nights, showing an increase since 2000 (56.0%).

Germany was the main market of origin, accounting for 15.6% of international tourism nights in 2006. Italy ranked second with 12.5%, followed by France (7.8%), the United States (5.8%), Hungary (5.5%) and the United Kingdom (5.0%). Altogether, the six main countries accounted for about 52% of total international nights (Table 4.2.22.2).

Tourism's contribution to the local economy is very low. In 2006, the proportion of international tourism receipts in the country's GDP was 1.1%. This was the same as tourism expenditure (0.8 in 2000). This indicates that, in spite of the very low share of international tourists in terms of nights, tourist expenditure balanced the spending of Romanian tourists abroad, i.e. foreign tourists show a relatively high "expenditure capacity", which is typical of business tourism.

The following spider plot summarises the evolution of the global tourism performance of Romania in 2000 and 2006, according to the six indicators considered above.

Figure 4.2.22 - Situation of tourism in Romania in 2000 and 2006

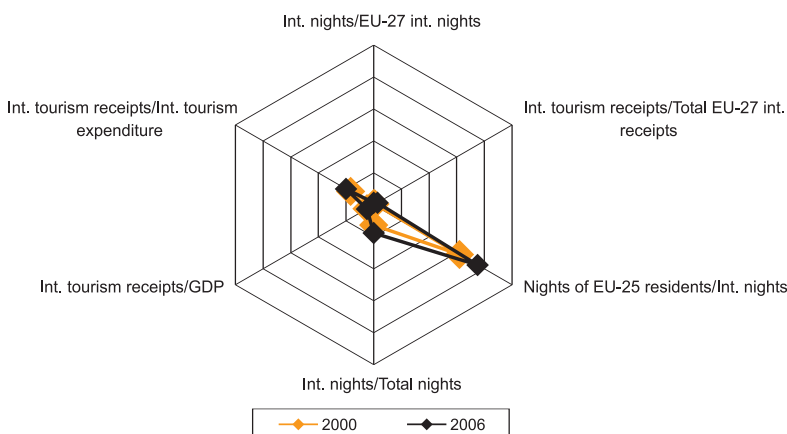


Table 4.2.22.2 - Main tourism markets in Romania- nights spent by non-residents (as % of total nights), 2000 and 2006

Markets	2000		2006	
	Country	%	Country	%
- 1st market	:	:	DE	15.6
- 2nd market	:	:	IT	12.5
- 3rd market	:	:	FR	7.8
- 4th market	:	:	US	5.8
- 5th market	:	:	HU	5.5
- 6th market	:	:	UK	5.0

Note: 2006 is the first year for which data are available.

4.2.23 Slovenia

Slovenia is one of the most important tourism destinations in eastern Europe and its role has strengthened in recent years. Adoption of the euro at the beginning of 2008 has made the costs of local tourism products and services easy to compare with costs in other European destinations, but this will probably have its effects on internal prices, too.

Table 4.2.23.1 - Main tourism indicators: Slovenia in 2000 and 2006

Indicators	2000	2006
- Share of international nights in the country as a proportion of total international nights in the EU-27	0.4%	0.5%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-27	0.5%	0.6%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country ¹	71.7%	75.5%
- Proportion of international tourism nights compared with total tourism nights in the country	50.3%	58.2%
- Proportion of international tourism receipts in GDP	4.9%	4.9%
- Ratio of international tourism receipts to expenditure	1.88	1.77

1) For 2000, share of nights spent by EU-15 residents.

As for other eastern European countries, the weight of Slovenia within the EU-27 area is still low. In 2006, the country recorded less than 1% for both total international tourism nights and tourism receipts (Table 4.2.23.1). International tourism generated about 58% of total tourism nights (about 50% in 2000), of which tourists coming from EU-25 countries spent about three quarters. This shows the growing influence of intra-area tourism on the national market.

Italy was the most important market of origin in 2006, accounting for 20.0% of total international tourism nights (18.1% in 2001). Italy was followed by Austria (15.0%), both passing Germany (13.6%) compared with 2001. Among the six main markets, the United Kingdom held fourth position (7.2%), followed by the Netherlands (4.0%) and Hungary (2.4%, Table 4.2.23.2).

International tourism contributed substantially to the country's economy. In 2006, international tourism receipts amounted to about 5% of GDP and the tourism balance was positive. Receipts were nearly twice as high as expenditure, meaning that gains from inbound tourism were much higher than expenditure on outbound tourism.

The following spider plot summarises the evolution of the global tourism performance of Slovenia in 2000 and 2006, according to the six indicators considered above.

4

Figure 4.2.23 - Situation of tourism in Slovenia in 2000 and 2006

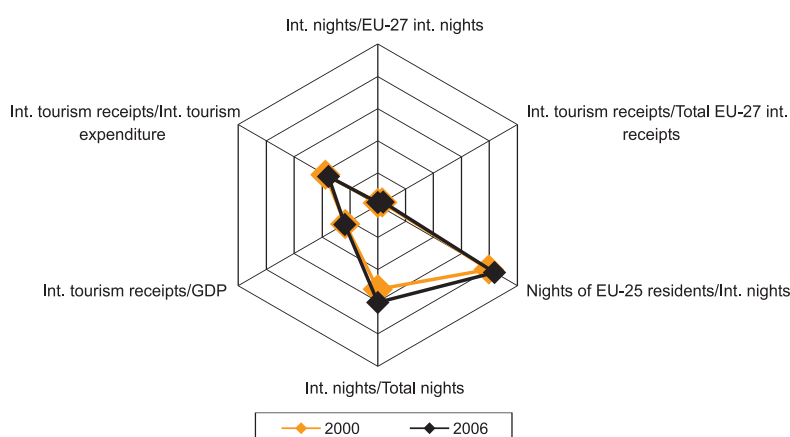


Table 4.2.23.2 - Main tourism markets in Slovenia - nights spent by non-residents (as % of total nights), 2001 and 2006

Markets	2001 ¹		2006	
	Country	%	Country	%
- 1st market	DE	22.7	IT	20.0
- 2nd market	IT	18.1	AT	15.0
- 3rd market	AT	16.5	DE	13.6
- 4th market	UK	5.0	UK	7.2
- 5th market	NL	3.7	NL	4.0
- 6th market	HU	2.3	HU	2.5

1) Data for 2000 not available.

COUNTRY DESCRIPTION

4.2.24 Slovakia

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

Table 4.2.24.1 - Main tourism indicators: Slovakia in 2000 and 2006

Indicators	2000	2006
- Share of international nights in the country as a proportion of total international nights in the EU-27	0.4%	0.5%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-27	0.2%	0.5%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country ¹	34.6%	83.8%
- Proportion of international tourism nights compared with total tourism nights in the country	35.4%	45.9%
- Proportion of international tourism receipts in GDP	2.3%	2.8%
- Ratio of international tourism receipts to expenditure	1.40	1.44

1) For 2000, share of nights spent by EU-15 residents.

Like Slovenia, Slovakia's impact within the EU-27 area was still low in 2006. The country recorded less than 1% for both total international tourism nights and tourism receipts (Table 4.2.24.1). International tourism generated about 46% of total tourism nights. Tourists who are residents of EU-25 countries, in particular those from neighbouring countries, spent about 84% of these nights. This indicates the strong influence of intra-area tourism on the national market.

However, unlike other eastern European countries, the bulk of international tourism nights was spent by tourists from eastern Europe and particularly from neighbouring countries. Among the six main markets of origin, the Czech Republic, Poland and Hungary accounted for about half of total international tourism nights in 2006 (53.3% in 2003).

Other important markets were Germany (17.6%), Austria (3.4%) and the United Kingdom (2.8%, Table 4.2.24.2).

The contribution of international tourism receipts to the country's GDP is low (2.8% in 2006 versus 2.3% in 2000) in comparison to other countries in the same area. This is probably due to the prevalence of proximity tourism. International tourism receipts were about 1.4 times higher than expenditure, indicating that expenditure by non-resident tourists was much higher than expenditure by Slovakian tourists abroad.

The following spider plot summarises the evolution of the global tourism performance of Slovakia in 2000 and 2006, according to the six indicators considered above.

Figure 4.2.24 - Situation of tourism in Slovakia in 2000 and 2006

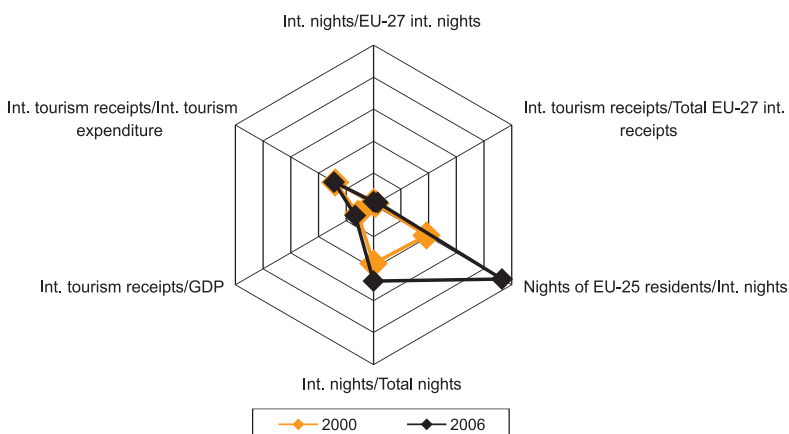


Table 4.2.24.2 - Main tourism markets in Slovakia - nights spent by non-residents (as % of total nights), 2003 and 2006

Markets	2003 ¹		2006	
	Country	%	Country	%
- 1st market	CZ	33.6	CZ	29.3
- 2nd market	DE	21.1	DE	17.6
- 3rd market	PL	13.8	PL	13.7
- 4th market	HU	5.9	HU	6.4
- 5th market	AT	3.6	AT	3.4
- 6th market	NL	1.6	UK	2.8

1) Data for 2000 not available.

4.2.25 Finland

Finland is mainly a generator of tourism, both at home and abroad.

Table 4.2.25.1 - Main tourism indicators: Finland in 2000 and 2006

Indicators	2000	2006
- Share of international nights in the country as a proportion of total international nights in the EU-27	0.5%	0.5%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-27	0.7%	0.7%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	57.0%	60.2%
- Proportion of international tourism nights compared with total tourism nights in the country	25.3%	27.5%
- Proportion of international tourism receipts in GDP	1.2%	1.1%
- Ratio of international tourism receipts to expenditure	0.76	0.69

In 2006, about 0.5% of total international tourism nights in the EU-27 were spent in Finland; the country also recorded less than 1% of total international tourism receipts from the same area (Table 4.2.25.1). Tourism was mostly generated by domestic tourists. Around 28% of total tourism nights were spent by non-resident tourists (around 25% in 2000), some 60% of which were from the EU-25 area (57.0% in 2000).

Among the six main markets of origin, Sweden ranked first, accounting for 11.7% of total tourism nights, closely followed by Germany (10.7%) and the United Kingdom (9.6%). France occupied fourth place (4.6%), ahead of the United States and Norway (4.1% each). Altogether, the six main markets of origin accounted for 44.8% of total international tourism nights in the country (50.9% in 2000, Table 4.2.25.2).

Along with Germany, the United Kingdom and Denmark, the contribution of international tourism to the country's GDP in comparison to other economic sectors is one of the lowest in the EU-27 (1.1%). International tourism receipts made up 69% of expenditure (76% in 2000), meaning that gains from incoming tourism were lower than the expenditure on outbound tourism.

The following spider plot summarises the evolution of the global tourism performance of Finland in 2000 and 2006, according to the six indicators considered above.

4

Figure 4.2.25 - Situation of tourism in Finland in 2000 and 2006

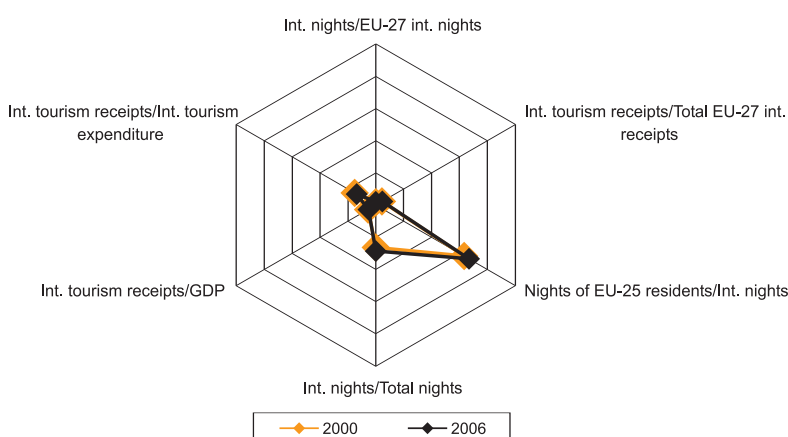


Table 4.2.25.2 - Main tourism markets in Finland - nights spent by non-residents (as % of total nights), 2000 and 2006

Markets	2000		2006	
	Country	%	Country	%
- 1st market	SE	15.8	SE	11.7
- 2nd market	DE	11.8	DE	10.7
- 3rd market	UK	9.0	UK	9.6
- 4th market	US	5.6	FR	4.6
- 5th market	NO	5.0	US	4.1
- 6th market	NL	3.7	NO	4.1

COUNTRY DESCRIPTION

4.2.26 Sweden

Like Finland, Sweden is basically more of a generator of tourism, both at home and abroad, than an international tourism destination.

Table 4.2.26.1 - Main tourism indicators: Sweden in 2000 and 2006

Indicators	2000	2006
- Share of international nights in the country as a proportion of total international nights in the EU-27	1.0%	1.1%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-27	2.0%	2.9%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	56.1%	55.3%
- Proportion of international tourism nights compared with total tourism nights in the country	21.7%	22.9%
- Proportion of international tourism receipts in GDP	1.7%	2.4%
- Ratio of international tourism receipts to expenditure	0.51	0.79

In 2006, the country accounted for about 1% of total international tourism nights spent in the EU-27 and almost 3% of international tourism receipts (Table 4.2.26.1). This means that the profit margin on incoming tourism was much higher than the volume of incoming tourism. However, international tourism has a low market share in comparison to domestic tourism. Non-resident tourists only spent about 23% of total nights. About 55% of these nights were recorded tourists coming from EU-25 countries. This indicates the relatively low influence of intra-area tourism in comparison to other EU-25 Member States.

As far as the six main markets of origin are concerned, Sweden's neighbouring countries accounted for the largest number of nights spent by foreign tourists. Norway, Denmark and Finland together made up about 38% of total international nights (about 37% in 2000). Regarding other

countries, Germany with 19.4% (20.8% in 2000) ranked second after Norway, far ahead of Denmark (9.5%), the Netherlands (6.5%), the United Kingdom (5.9%) and Finland (3.9%, Table 4.2.26.2).

The contribution of international tourism to the country's GDP, in comparison to other economic sectors, is, at 2.6% in 2006 (1.7% in 2000), higher than in Finland. International tourism receipts represented 79% of expenditure (51% in 2000), meaning that expenditure by Swedish tourists abroad was higher than expenditure by non-resident tourists in the country.

The following spider plot summarises the evolution of the global tourism performance of Sweden in 2000 and 2006, according to the six indicators considered above.

Figure 4.2.26 - Situation of tourism in Sweden in 2000 and 2006

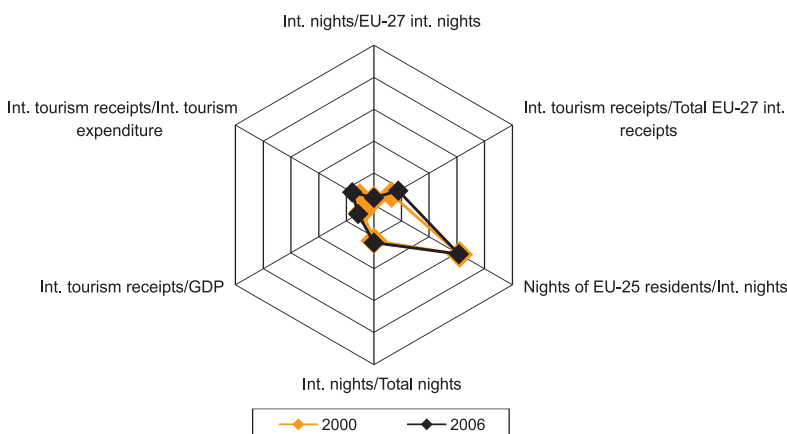


Table 4.2.26.2 - Main tourism markets in Sweden - nights spent by non-residents (as % of total nights), 2000 and 2006

Markets	2000		2006	
	Country	%	Country	%
- 1st market	NO	21.6	NO	24.8
- 2nd market	DE	20.8	DE	19.4
- 3rd market	DK	9.6	DK	9.5
- 4th market	UK	6.4	NL	6.5
- 5th market	NL	5.5	UK	5.9
- 6th market	FI	5.4	FI	3.9

4.2.27 The United Kingdom

The United Kingdom is one of the most important countries of origin for tourism, both at home and abroad, and also one of the main destinations in Europe for specific market segments (urban/cultural tourism, business tourism, language tours, etc.).

Table 4.2.27.1 - Main tourism indicators: The United Kingdom in 2000 and 2006

Indicators	2000	2006
- Share of international nights in the country as a proportion of total international nights in the EU-27	8.3%	9.5%
- Share of international tourism receipts in the country as a proportion of total international receipts in the EU-27	10.9%	10.6%
- Share of nights spent by EU-25 residents as a proportion of total international nights in the country	40.4%	52.2%
- Proportion of international tourism nights compared with total tourism nights in the country	26.2%	34.1%
- Proportion of international tourism receipts in GDP	1.5%	1.4%
- Ratio of international tourism receipts to expenditure	0.57	0.53

In 2006, 9.5% of total international tourism nights in the EU-27 were spent in the country (8.3% in 2000), while the share of tourism receipts was 10.6% (10.9% in 2000, Table 4.2.27.1). This indicates that the profit margin on incoming tourism was a little higher than the volume of incoming tourism. Non-resident tourists spent more than a third of total nights. Tourists from the EU-25 accounted for about 52% of total international nights (about 40% in 2000). This highlights the rather low influence of intra-area tourism on the national market, in comparison to other EU-25 countries, and the relatively high incidence of tourists coming from countries outside the EU-25 area.

Among the six main markets of origin, the United States ranked first, recording 17.7% of total tourism nights, followed by Germany (11.2%), in 2006. France held third position with 7.3%, closely followed by Spain (6.8%), Italy

(4.8%) and the Netherlands (4.3%). Altogether, the six main markets of origin accounted for more than half of total international nights in the country (47.5% in 2000, Table 4.2.27.2).

Along with Germany, Denmark and Finland, the contribution of international tourism to the country's GDP in comparison to other economic sectors is, at 1.4% in 2006, one of the lowest amongst EU-25 countries (1.5% in 2000). International tourism receipts accounted for 53% of expenditure (57% in 2000), meaning that expenditure by residents abroad was much higher than expenditure by non-residents in the country.

The following spider plot summarises the evolution of the global tourism performance of the United Kingdom in 2000 and 2006, according to the six indicators considered above.

Figure 4.2.27 - Situation of tourism in the United Kingdom in 2000 and 2006

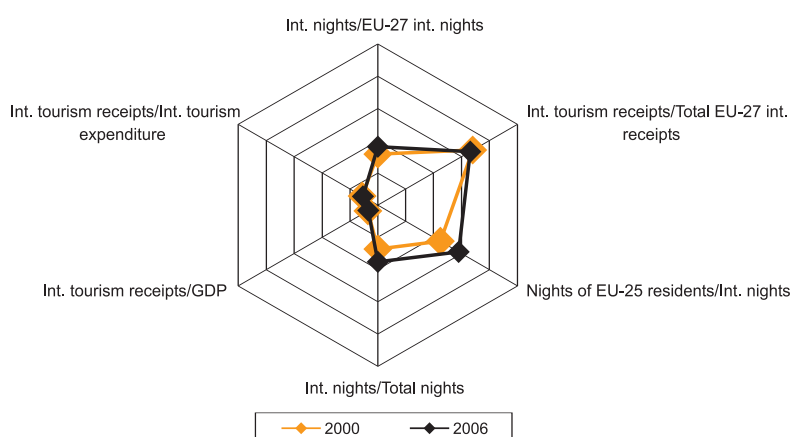
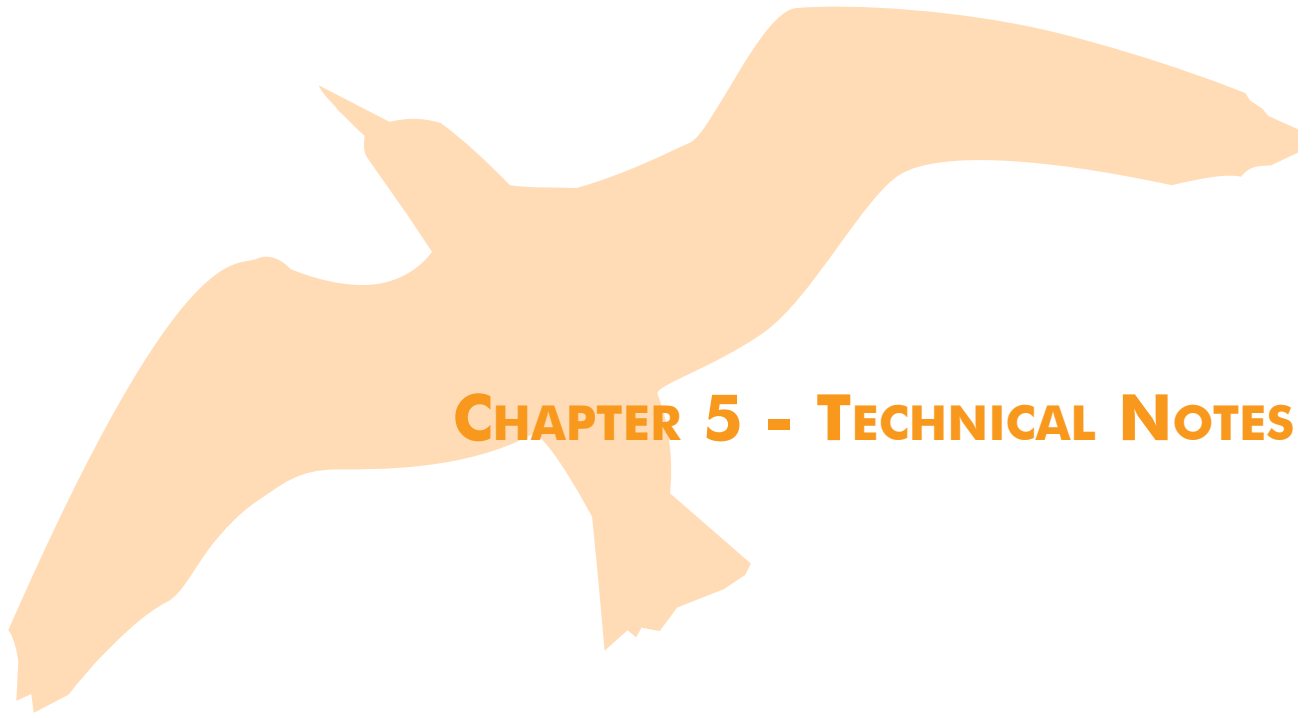


Table 4.2.27.2 - Main tourism markets in the United Kingdom - nights spent by non-residents (as % of total nights), 2000 and 2006

Markets	2000		2006	
	Country	%	Country	%
- 1st market	US	21.8	US	17.7
- 2nd market	DE	8.4	DE	11.2
- 3rd market	FR	6.0	FR	7.3
- 4th market	IT	4.0	ES	6.8
- 5th market	NL	3.7	IT	4.8
- 6th market	IE	3.6	NL	4.3



CHAPTER 5 - TECHNICAL NOTES

5. TECHNICAL NOTES

5.1 General information

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

<http://ec.europa.eu/eurostat/ramon> (see "Concepts and Definitions" (CODED))

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

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

5.2 Terms and definitions

General terms and definitions

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

Employment (total): Covers both employees and self-employed persons aged 15 and older who are engaged in some form of productive activity in the economy. In Table 1.15, all employment data relate to the second quarter of each year, except for France (2000 to 2002), for which the first quarter of each year is used.

Enterprise: An enterprise is defined as the smallest combination of legal unit that constitutes an organisational unit producing goods or services and benefits from a certain degree of autonomy in decision-making, especially in the allocation of its resources. An enterprise can carry out one or more activities at one or more locations.

Establishment: The local unit of an enterprise or part of an enterprise situated in a geographically identified place, where or from where an economic activity is carried out in which — save for certain exceptions — one or more persons work (even if only part-time) for one and the same enterprise. An accommodation establishment fits the definition of a local unit as the production unit, irrespective of whether accommodation of tourists is the main or secondary activity. This means that all establishments are classified in the accommodation sector if their capacity exceeds the national minimum, even if the majority of their turnover comes from restaurant or other services.

Gross domestic product (GDP): Final result of the production activity of resident producer units.

Gross domestic product (GDP) at constant prices: Gives the volume of GDR. Constant price estimates of GDP are obtained by expressing values in terms of a base period.

Gross domestic product (GDP) at current prices: GDP at prices of the current reporting period. Also known as nominal GDR.

Growth rate: Growth rates are the rates of total change over a specified reference period from values at the beginning of the period or at a specified earlier time.

Market share: Measures the relative size of an entity as a proportion of the total value of all entities.

Tourism specific terms and definitions

Accommodation establishments: Local kind-of-activity unit (local KAU) which provides accommodation. Includes collective tourist accommodation establishments and private tourist accommodation.

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

Average length of stay: This is obtained by dividing the number of nights spent by the number of arrivals.

Business trip: It is recommended that the term "trip" should be used to describe tourism from the standpoint of the place or country of origin. A business trip covers the whole period for which a person travels, but for professional purposes.

Collective tourist accommodation establishment: An accommodation establishment that provides overnight lodging for travellers in a room or some other unit. However, the number of places it provides must be greater than a specified minimum for groups of persons exceeding a single family unit and all the places in the establishment must come under common commercial-type management, even if it is non-profit-making. Includes hotels and similar establishments, specialised establishments and other collective establishments.

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

Gross annual occupancy rate: The gross annual occupancy rate of bed places in any one year is obtained by dividing total overnight stays by the product of the bed places and the number of days in the corresponding year for the same group of establishments, and multiplying the quotient by 100 to express the result as a percentage.

Gross utilisation of bed places: The gross utilisation or gross occupancy rate of bed places measures the difference in the use of accommodation capacity between various types of accommodation establishments (e.g. hotels against other collective accommodation) or, within the same type, between different categories (e.g. in hotels by star classification). When calculated on a monthly basis, it indicates the seasonal patterns of use. For hotels, the gross occupancy rate in one month is obtained by dividing overnight stays by the product of the bed places on offer and the number of days in the corresponding month when the bed places are available for use. The quotient is multiplied by 100 to express the result as a percentage:

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

Holiday dwellings: Include collective facilities under common management, such as clusters of houses and bungalows arranged as dwelling-type accommodation and providing limited hotel services (not including daily bed-making and cleaning). Holiday villages providing hotel services should, by definition, be included in hotels, even if they are usually not arranged in rooms. Only establishments which do not provide hotel services should be included in this group.

Holiday trip: It is recommended that the term "trip" should be used to describe tourism from the standpoint of the place or country of origin. A holiday trip covers the whole period for which a person travels for leisure purposes.

Hotels and similar establishments: Establishments that have more than a specified minimum number of rooms, come under common management, and provide certain services, including room service, daily bed-making and cleaning of sanitary facilities, are grouped in classes and categories, depending on the facilities and services provided, and do not fall into the category of specialised establishments.

Inbound tourism: Activities of non-residents of a given country travelling to and staying in places in that country but outside their usual environment.

Internal tourism: Comprises domestic and inbound tourism.

International tourism: Comprises inbound tourism and outbound tourism.

Length of stay: The length of stay for domestic and overnight trips is defined as nights spent.

National tourism: Comprises domestic tourism and outbound tourism.

Nights spent by residents and non-residents: A night spent (or overnight stay) is each night that a guest actually spends (sleeps or stays) or is registered (but not necessarily physically present) in a collective accommodation establishment or in private tourist accommodation. However, in the context of this publication, nights relate only to nights in collective accommodation establishments. Overnight stays are recorded by country of residence of the guest and by month. Normally, the date of arrival is different from the date of departure but persons arriving after midnight and leaving on the same day are included in overnight stays. A person should not be registered in two accommodation establishments at the same time. Overnight stays by non-tourists (e.g. refugees) should be excluded if possible.

Number of bed places: The number of bed places in an establishment or dwelling is determined by the number of persons who can stay overnight in the beds provided in the establishment (dwelling), not counting any extra beds that may be set up at the customer's request. The term "bed place" means a single bed; a double bed is counted as two bed places. The unit serves to measure the capacity of any type of accommodation. A bed place is also a place for one person on a camping pitch or in a boat at a mooring. One camping pitch should be counted as four bed places if the actual number of bed places is not known.

Number of bed places per establishment/hotel: Number of bed places in a defined area divided by the number of establishments/hotels in the same area.

Other collective accommodation: Any establishment intended for tourists which may be non-profit making, coming under common management, providing minimum common services (not including daily bed-making) and not necessarily being arranged in rooms but perhaps in dwelling type units, campsites or collective dormitories and often engaging in some other activity than the provision of accommodation, such as health care, social welfare or transport.

Other collective accommodation n.e.c.: Comprises youth hostels, tourist dormitories, group accommodation, holiday homes for the elderly, holiday accommodation for employees and workers' hotels, halls of residence for students and school dormitories, and other similar facilities that come under common management, have a social interest and are often subsidised.

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

Tourism intensity (tourist nights per resident): This indicator compares the number of tourists (in terms of overnight stays) with the number of residents at a destination over the same period (e.g. day, month or year). It measures the intensity of tourism demand over that period and is one of the indicators used to measure the capacity of a tourist destination. It shows the number of nights spent in a country divided by the inhabitants of the same country.

Tourism balance: Difference between international tourism receipts and expenditure. In countries that are basically destinations for international tourism the difference is usually positive (i.e. receipts exceed expenditure). This means that the economy gains from tourism. By contrast, countries that are mainly generators of international tourism generally show a negative balance (i.e. expenditure exceeds receipts). This means that their economy loses from tourism, because expenditure by residents abroad is higher than that by international tourists in the country.

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

Tourism receipts: Expenditure by international inbound tourists, including their payments to international carriers for international transport.

Tourist campsite: Consists of collective facilities in enclosed areas for tents, caravans, trailers, and mobile homes. All come under common management and provide some form of tourist services (shops, information, recreational activities). Camping sites let pitches for tents, caravans, mobile homes and similar shelter to overnight visitors who want to stay on a "touring" pitch for one night, a few days or week(s), and also to people who want to hire a "fixed" pitch for a season or a year. Hired fixed pitches for long-term rent (more than a year) may be considered as private accommodation.

TECHNICAL NOTES

5.3 Symbols and abbreviations

:	not available
bn	billion
mio	million

Country abbreviations

EU-27	European Union of 27 countries (as of 1 January 2007)
EU-25	European Union of 25 countries (as of 1 May 2004)
EU-15	European Union of 15 countries (up to 30 April 2004)
BLEU	Belgium and Luxembourg
EFTA	European Free Trade Association

BE	Belgium
BG	Bulgaria
CZ	Czech Republic
DK	Denmark
DE	Germany
EE	Estonia
IE	Ireland
EL	Greece
ES	Spain
FR	France
IT	Italy
CY	Cyprus
LV	Latvia
LT	Lithuania
LU	Luxembourg
HU	Hungary
MT	Malta
NL	Netherlands
AT	Austria
PL	Poland
PT	Portugal
RO	Romania
SI	Slovenia
SK	Slovakia
FI	Finland
SE	Sweden
UK	United Kingdom

HR	Croatia
MK ¹	Former Yugoslav Republic of Macedonia
TR	Turkey

IS	Iceland
LI	Liechtenstein
NO	Norway
CH	Switzerland

Other abbreviations

DMS	Destination Management System
FIFA	Fédération Internationale de Football Association
GDP	Gross Domestic Product
GPS	Global Positioning System
GSM	Global System for Mobile Communication
ICT	Information and Communication Technologies
UEFA	Union of European Football Associations
UMTS	Universal Mobile Communication System

Organisations

OECD	Organisation for Economic Co-operation and Development
UN	United Nations
UNWTO	World Tourism Organisation

1) Provisional code which does not prejudice in any way the definitive nomenclature for this country, which will be agreed following the conclusion of negotiations currently taking place on this subject at the United Nations. In tables of chapter 2 and 3 the code "MK" is used.

5.4 Data sources

Name	Web address	Sources used
Eurostat	http://ec.europa.eu/eurostat	Free dissemination databases: - Tourism – production database - Balance of payment database - National accounts database - Population database - Labour market database
European Commission - DG Enterprise	http://ec.europa.eu/enterprise/services/tourism/index_en.htm	The European Tourism Industry - A multi-sector with dynamic markets

Country	Web address	Source name
Belgium	http://www.statbel.fgov.be	Nationaal Instituut voor de Statistiek / Institut National de Statistique (Statistics Belgium)
Bulgaria	http://www.nsi.bg	National Statistical Institute
Czech Republic	http://www.czso.cz	Czech Statistical Office
Denmark	http://www.dst.dk	Danmarks Statistics (Statistics Denmark)
Germany	http://www.destatis.de	Statistisches Bundesamt (Federal Statistical Office)
Estonia	http://www.stat.ee	Statistikaamet (Statistical Office of Estonia)
Ireland	http://www.cso.ie	Central Statistics Office
Greece	http://www.statistics.gr	National Statistical Service of Greece
Spain	http://www.ine.es	Instituto Nacional de Estadística (INE)
France	http://www.insee.fr	Institut National de Statistique et des Etudes Economiques (National Institute for Statistics and Economic Studies)
Italy	http://www.istat.it	Istituto nazionale di statistica (National Institute of Statistics)
Cyprus	http://www.mof.gov.cy/mof/cystat/statistics.nsf	Statistical Service of the Republic of Cyprus
Latvia	http://www.csb.lv	Central Statistical Bureau of Latvia
Lithuania	http://www.stat.gov.lt	Statistics Lithuania
Luxembourg	http://www.statec.lu	Service Central de la Statistique et des Etudes Economiques
Hungary	http://www.ksh.hu	Központi Statisztikai Hivatal (Hungarian Central Statistical Office)
Malta	http://www.nso.gov.mt	National Statistics Office
Netherlands	http://www.cbs.nl	Centraal Bureau voor de Statistiek (Statistics Netherlands)
Austria	http://www.statistik.at	Statistik Austria
Poland	http://www.stat.gov.pl	Central Statistical Office (GUS)
Portugal	http://www.ine.pt	Instituto Nacional de Estatística (INE)
Romania	http://www.insse.ro	Institutul National de Statistica (National Institute of Statistics)
Slovenia	http://www.stat.si	Statistical Office of the Republic of Slovenia
Slovakia	http://www.statistics.sk	Statistický úrad Slovenskej republiky (Statistical Office of the Slovak Republic)
Finland	http://www.stat.fi	Tilastokeskus (Statistics Finland)
Sweden	http://www.scb.se	Statistiska centralbyrån (Statistics Sweden)
United Kingdom	http://www.statistics.gov.uk	Office for National Statistics
Croatia	http://www.dzs.hr	Croatian Bureau of Statistics (CROSTAT)
Former Yugoslav Republic of Macedonia	http://www.stat.gov.mk	State Statistical Office
Turkey	http://www.die.gov.tr/ENGLISH/index.html	Turkish Statistical Institute
Iceland	http://www.statice.is	Hagstofa Islands (Statistics Iceland)
Liechtenstein	http://www.llv.li/amtsstellen/llv-avw-statistik.htm	Statistik Liechtenstein
Norway	http://www.ssb.no	Statistisk sentralbyrå (Statistics Norway)
Switzerland	http://www.statistik.admin.ch	Statistik Schweiz

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European Commission

Panorama on tourism

Luxembourg: Office for Official Publications of the European Communities

2008 — 81 pp. — 21 x 29.7 cm

ISBN 978-92-79-05151-7

Price (excluding VAT) in Luxembourg: EUR 20

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KS-30-08-550-EN-N

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ISBN 978-92-79-05151-7



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