

Inbound and outbound tourism in the European Union

Statistics in focus

INDUSTRY, TRADE AND SERVICES

POPULATION AND SOCIAL CONDITIONS

SCIENCE AND TECHNOLOGY

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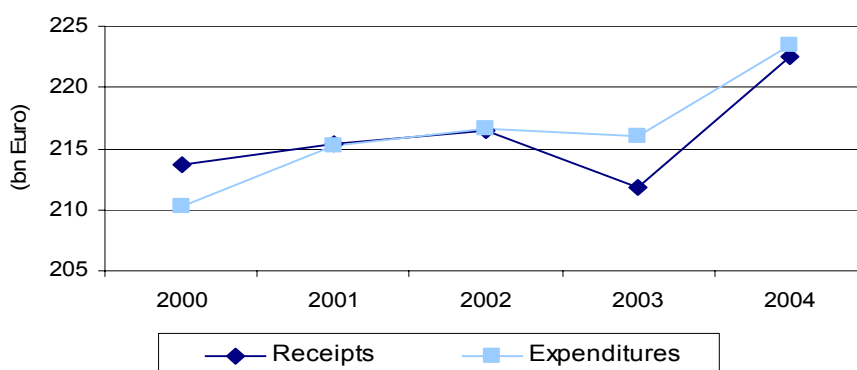
Main features

- Inbound tourism is especially important for the tourism industry in small EU countries.
- The main period for inbound tourism is the third quarter (July to September), with the exception of Austria with its peak period in the winter season (first quarter). More than a third of all non-resident nights in the EU-25 were spent between July and September.
- The only country that strongly depends on a specific season for inbound tourism is Greece (summer period).
- Spain is the main destination of outbound tourism for most EU countries.
- In general, the average length of stay for trips of 4 nights or more is longer for outbound than for domestic trips.

Introduction

This volume of "Statistics in Focus" deals with inbound and outbound tourism in the European Union, EFTA and candidate countries. It examines some major aspects of this phenomenon country by country. All information on inbound and outbound tourism included in this volume will soon be complemented by two new Eurostat publications, entitled "Pocketbook on Tourism" and "Panorama on Tourism". In these two upcoming publications, detailed information available in Eurostat's free dissemination database will be presented in the form of tables and analytical texts. Both publications cover data for a longer period. The "Pocketbook" is written and designed for the broad public, while the "Panorama" is intended for the specialised user. The "Panorama" publication will also include a CD-Rom containing most of the data in Eurostat's database on tourism and some general economic information related to tourism for the EU-25, EFTA and candidate countries. Some tables for this "Statistics in Focus" were directly taken from these publications in order to present more detailed information on certain topics of inbound and outbound tourism.

Figure 1: Tourism receipts and expenditure in the EU-25 between 2000 and 2004 (bn EUR)



High share of inbound tourism for nights in hotels and similar establishments

Cross-border tourism is a very important economic factor for the EU. In 2004, expenditure on tourism in the 25 EU countries was €223.4bn, whilst the income received from tourism was €222.5bn. Figure 1 shows that receipts and expenditure remained fairly consistent between 2000 and 2004.

The main information indicator for inbound tourism is the number of nights spent in a country by non-residents. Table 1 presents guest flows from other countries to each single country in the EU, the EFTA

and Candidate countries. In 2004, foreign tourists spent nearly 862 million nights in accommodation establishments in the EU-25. That is more than 40% in all nights spent by tourists. Nights spent in hotels exceeded the number of nights spent in other accommodation establishments (campsites and holiday dwellings) by a factor of 2.6. Within the EU, all countries except Luxembourg registered more nights in hotels and similar establishments than in other collective accommodation. Accordingly, the analysis of inbound tourism focuses mainly on hotels.

Table 1: Nights spent by non-residents in hotels and similar establishments and in other collective accommodation, 2004

	Hotels and similar establishments		Other collective accommodation establishments		Total	
	Non-resident nights		Non-resident nights		Non-resident nights	
	1 000	% of total nights	1 000	% of total nights	1 000	% of total nights
EU-25¹	626 524	45.0	235 401	31.9	861 925	40.5
BE	10 281	71.7	5 649	38.5	15 929	54.9
CZ	15 881	63.7	3 100	19.6	18 980	46.5
DK	4 767	49.3	4 806	29.2	9 572	36.6
DE	36 631	18.8	8 742	6.1	45 374	13.4
EE	2 602	79.0	145	31.2	2 747	73.1
EL	39 760	74.4	648	63.1	40 407	74.1
ES	135 041	57.5	74 890	68.0	209 931	60.8
FR	70 391	37.3	33 787	35.8	104 178	36.8
IE	17 321	70.1	2 636	38.2	19 957	63.1
IT	97 173	41.6	43 992	39.4	141 165	40.9
CY	13 554	92.7	82	87.5	13 637	92.7
LV	963	59.0	20	11.3	983	54.4
LT	1 131	68.9	66	12.6	1 197	55.2
LU	1 194	93.3	1 273	90.0	2 467	91.6
HU	8 046	58.0	1 994	42.1	10 040	53.9
MT	7 397	96.4	75	99.1	7 472	96.5
NL	14 618	51.5	10 768	20.5	25 386	31.4
AT	55 160	74.5	13 110	61.7	68 270	71.7
PL	6 876	37.3	2 437	8.6	9 313	20.0
PT	23 215	68.5	1 655	21.5	24 870	59.8
SI	3 258	65.6	930	39.8	4 188	57.4
SK	3 432	51.1	1 165	29.8	4 597	43.2
FI	3 769	27.3	637	22.1	4 406	26.4
SE	5 061	23.5	4 663	22.1	9 724	22.8
UK	49 003	29.3	18 131	22.5	67 134	27.1
IS	1 146	78.0	333	50.1	1 479	69.3
LI	101	97.0	44	76.6	145	89.7
NO	4 596	28.1	2 846	31.9	7 442	29.4
CH ²	19 273	57.4	12 838	37.0	32 111	47.0
BG	10 139	74.8	164	27.5	10 304	72.8
HR ³	16 830	85.6	14 153	90.9	30 983	87.9
RO ²	2 301	14.1	90	5.1	2 391	13.2

1) EU-25 nights include 2002 data for EL, 2003 values for BE, IE, LV, HU, PT and UK and preliminary values for IT.

2) 2001 data.

3) 2003 data.

In 2004, Spain, Italy and France reported the highest absolute numbers of non-resident nights in hotels. They accounted for 21.5%, 15.5% and 11.2%, respectively, of the EU total. In proportional terms, inbound tourists accounted for more than 50% of hotel nights in 17 of the 25 EU countries, reaching more than 90% in the smallest countries, Cyprus, Malta and Luxembourg. Of the countries with the highest absolute numbers, only Spain recorded more than 50% of nights in hotels spent by non-residents, while France and Italy reported only about 40% of nights spent by tourists from other countries. This means that domestic tourism was more important for the French and Italian tourism industry than inbound tourism. This was also the case for Denmark, Germany, Poland, Finland, Sweden and the United Kingdom. With 18.8%, Germany registered by far the smallest percentage of non-resident tourists among all tourists in hotels (Table 1).

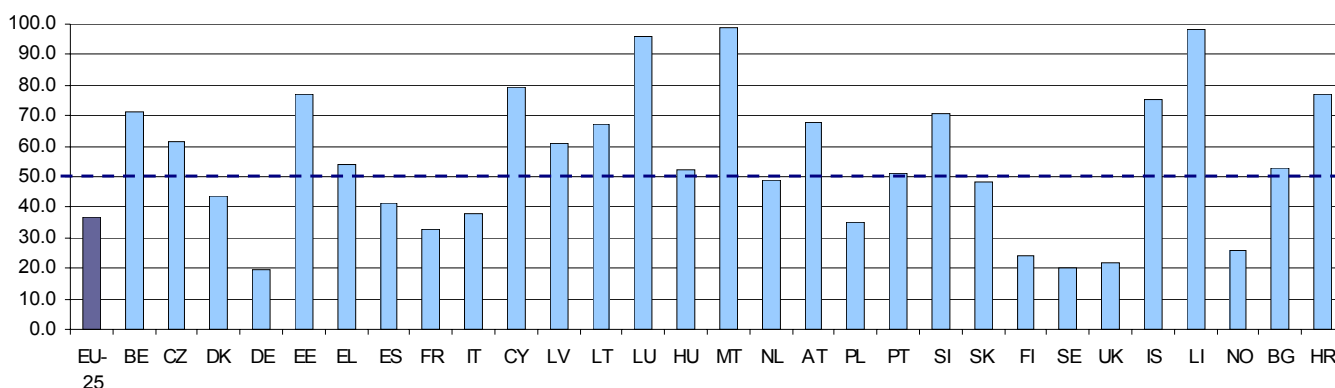
In all EU countries except Austria, the largest number of non-resident nights was reported in the third quarter of 2004 (Table 2). The smallest figures were reported in all countries for the first quarter, with the exception of Italy, Austria, Slovakia and Finland, which registered the smallest numbers for the fourth quarter. This is mainly due to the large number of tourists visiting the winter sport resorts of these countries at the beginning of the year. Of these four countries, Austria is again an exception because it is the only EU country that reported the largest number of non-resident nights for the first quarter of the year, including the peak month of February. The relative difference between the worst and best quarters gives an indication of the seasonal dependency of a country on foreign tourists. Except for Greece, where the best quarter exceeded by more than 22 times the figures for the smallest quarter, most EU countries ranged between factors of 1.5 and 3.0. Accordingly, countries with a factor of less than 2 do not depend too much on a specific season for inbound tourism. Regarding the monthly distribution of nights, numbers peaked in August in 17 countries, in July in 7, and in February in 1 (Austria). The smallest absolute numbers for all countries (except Finland for April) were recorded in January, February, November or December.

Table 2: Nights spent by non-residents in hotels and similar establishments by quarter, 2004

	First quarter %	Second quarter %	Third quarter %	Fourth quarter %	Total in 1 000
EU-25	17.2	27.3	37.2	18.3	630 132.0
BE	19.5	27.1	28.8	24.6	10 353.0
CZ	19.5	26.9	31.7	22.0	15 880.6
DK	13.3	27.6	40.6	18.5	4 766.6
DE	19.3	26.0	31.9	22.9	36 576.9
EE	14.2	27.6	36.5	21.6	2 601.5
EL	2.5	30.6	55.9	11.0	39 759.6
ES	15.0	27.8	39.0	18.2	135 041.2
FR	17.9	27.7	35.2	19.2	70 390.7
IE	12.7	29.2	42.4	15.7	17 321.0
IT	16.5	30.7	37.0	15.8	93 722.2
CY	11.0	28.6	40.4	20.0	13 554.3
LV	12.5	26.7	40.4	20.4	1 157.8
LT	12.1	28.2	41.8	18.0	1 125.8
LU	17.6	27.9	30.4	24.1	1 193.9
HU	14.2	28.7	35.8	21.3	8 604.9
MT	16.4	25.8	38.1	19.8	8 353.7
NL	18.5	29.0	30.3	22.2	14 618.2
AT	35.2	18.6	31.4	14.8	55 118.7
PL	13.8	28.7	37.3	20.1	6 876.1
PT	17.0	28.7	35.0	19.2	23 042.5
SI	17.6	27.1	36.7	18.6	3 258.4
SK	24.7	22.5	35.4	17.4	3 431.5
FI	22.4	23.2	34.3	20.2	3 770.0
SE	16.3	26.2	38.6	18.9	5 060.9
UK	16.4	26.0	35.1	22.4	54 552.0
IS	10.4	26.4	51.4	11.8	1 145.8
LI	29.1	23.9	28.5	18.5	100.6
NO	21.1	25.5	42.8	10.6	4 596.2
CH	28.7	24.2	35.8	11.3	15 786.1
BG	4.5	23.2	66.4	5.9	8 986.5
HR	:	:	:	:	
RO	:	:	:	:	

Note: Preliminary data for BE (January to May), EE, ES, IT, HU, PT, FI and UK (January to December). June for BE estimated. 2003 data for BE (July to December), EL and BG (January to December), IE (January to September, October to December estimated) and CH (January to November).

Figure 2: Arrivals of non-residents as % of total arrivals at hotels and similar establishments, 2004 (%)



Note: 2003 data for BE, EL, LV, HU, PT, UK and HR. No data available for IE, CH, RO and TR.

To gauge the importance of non-residents for tourism in a country, arrivals can be used to complement information on nights spent and can also be compared with arrivals of domestic tourists. Figure 2 shows that the number of arrivals of tourists from abroad exceeded the number of domestic tourists in more than half of all EU countries. Ten out of 24 EU countries recorded

more than two-thirds of inbound arrivals among total arrivals. Inbound tourists were most important in Malta and Luxembourg accounting for more than 90% of total arrivals. With the exception of Belgium, Luxembourg and Austria, all of these 10 countries were new Member States.

Outbound tourism in the EU-25 almost as important as domestic tourism

Table 3 shows that EU citizens made more than 417 million trips of four nights or more, of which more than 43% were outside their own country (about 180 million). Outbound trips accounted for almost half of all nights spent on trips (2 058 million). In 11 of all the EU countries for which data are available, outbound trips of 4 nights or more even exceeded the number of domestic trips in the same category. The highest percentages were registered for Luxembourg (99.3%, 7.0 million), Belgium (78.8%, 65.8 million), Slovenia

(73.0%, 10.0 million) and Ireland (71.1%, 28.6 million). On the other hand, the summer destinations Greece, Spain, France, Italy and Portugal had, together with Hungary and Poland, the smallest proportions. This country pattern is confirmed by the number of nights spent on trips of 4 nights or more. However, these percentages were slightly higher in almost all countries compared to the number of trips, with the exception of Italy.

Table 3: Domestic and outbound holidays of 4 nights or more, 2004 (in 1 000)

	Domestic holidays		Outbound holidays		Total holidays	
	Trips ¹	Nights ¹	Trips ²	Nights ²	Trips ¹	Nights ¹
EU-25	237 860	2 268 200	180 347	2 058 351	417 736	4 321 837
BE	1 478	13 902	5 505	65 754	6 983	79 656
CZ	5 552	46 812	4 031	36 152	9 583	82 964
DK	1 927	14 356	3 269	32 893	5 195	47 249
DE	37 388	320 115	66 559	808 251	103 947	1 128 366
EE	125	804	122	1 136	246	1 940
EL	3 944	50 616	420	6 215	4 364	56 831
ES	20 942	289 363	2 820	34 820	23 762	324 183
FR	67 216	638 644	13 856	140 702	81 071	779 346
IE	1 069	8 455	2 626	28 632	3 695	37 087
IT	27 905	330 000	9 232	92 245	37 137	423 000
CY	:	:	470	5 569	:	:
LV	219	2 598	305	4 325	525	6 923
LT	360	2 809	567	8 891	927	11 699
LU	5	46	676	6 998	681	7 044
HU	3 969	28 047	1 481	11 614	5 450	39 661
MT	:	:	:	:	:	:
NL	6 956	62 668	11 519	138 329	18 475	200 998
AT	2 769	19 806	5 072	49 690	7 841	69 496
PL	13 613	131 293	3 026	38 933	16 639	170 226
PT	3 225	35 523	940	11 913	4 165	47 436
SI	414	2 922	1 121	9 985	1 535	12 907
SK	2 554	18 464	1 955	18 732	4 509	37 197
FI	4 308	29 842	1 892	20 418	6 200	50 260
SE	4 622	33 915	4 185	43 155	8 807	77 069
UK	27 300	187 200	38 700	443 000	66 000	630 300
IS	:	:	:	:	:	:
LI	:	:	:	:	:	:
NO	2 877	22 630	2 916	32 377	5 792	55 007
CH	:	:	:	:	:	:
BG	:	3 857	1 074	:	:	:
HR	:	:	:	:	:	:
RO	:	:	:	:	:	:

1) EU-25 without CY and MT. 2) EU-25 without MT.

Note: 2002 data for EL, 2003 data for DK, IE and LV. Preliminary data for IT. Estimated data for PL.

Schematic map: Country of preference by outbound tourists per country

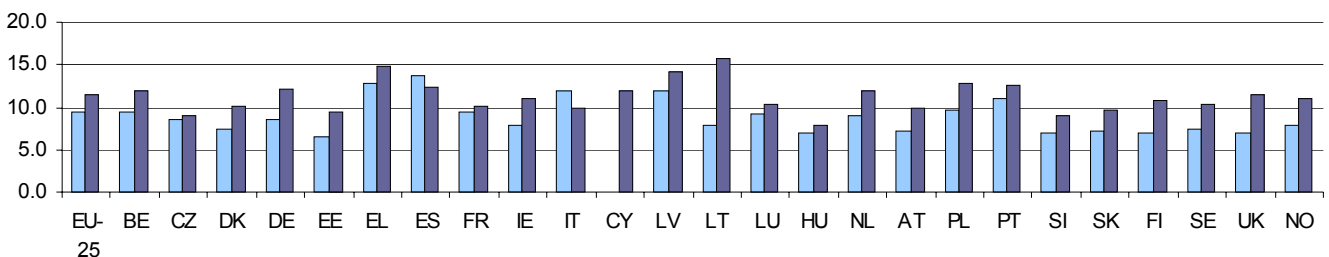


Note: The only outbound trips registered are those to the ex-15 EU countries, plus Poland, the Czech Republic, Slovakia and Hungary. Other destinations are not collected by individual countries.

The above map presents the main destination of outbound tourism by country, as measured by the number of trips of 4 nights or more (see map details in the methodological notes). Although Spanish tourists prefer to stay for longer holidays in their own country, Spain's hotel capacity is large enough for it to be the main destination for many other European countries as well. Destination countries can be broadly divided into three groups: countries preferred as the main destination by several other countries, countries that are the favourite of only one other country and countries that are not the favourite of any other country. Spain, France, Germany and Italy belong to the first group, the Czech Republic, Greece and Slovakia to the second group. Spain is by far the major country within the first

group. Citizens of 9 of the 23 countries for which data were available preferred Spain as their main destination, with percentages ranging between 36% for Portugal and 12% for Denmark. Except for France and Portugal, only countries from the northern part of Europe preferred Spain as their main destination abroad. France was the favourite destination for travellers from 4 countries, Germany for tourists from 3 and Italy for citizens of 2 European countries. For the second group, it is interesting to note that these countries were the main destination for their neighbouring countries, with the Czech Republic and Slovakia being special cases as they prefer each other as their respective main destinations, though at a low percentage.

Figure 3: Domestic and outbound holidays of 4 nights or more, average length of stay per trip, 2004 (days)



1) EU-25 without CY

Note: 2002 data for EL, 2003 data for DK, IE and LV. Preliminary data for IT. Estimated data for PL.

No data available for IS, LI, CH, BG, HR, RO and TR.

Domestic (1) Outbound

German and UK citizens represented by far the main group of tourists travelling outside their countries. In 2004, Germany and the United Kingdom accounted for about 61% of all EU outbound nights on trips with 4 or more nights. In this context, it is interesting to note that relatively small countries like Belgium, the Czech Republic, the Netherlands, Austria and Sweden accounted for higher percentages of the EU total than Spain. This indicates that Spaniards prefer to stay for longer holidays in their own country. This is also confirmed by the fact that the average length of stay per trip of 4 nights or more for Spain is higher for domestic trips than for outbound trips (Figure 3). Italy is the only other EU country for which this is the case. All other countries showed a longer average duration for outbound than for domestic trips. The largest differences between outbound and domestic trips in terms of the average length of stay were registered for Lithuania, with 7.9 days, the United Kingdom, with 4.5 days, Finland, with 3.9 days, and Germany, with 3.5 days.

Table 4 is taken from the Panorama and shows outbound holiday trips of 4 nights or more by type of accommodation. Other collective accommodation establishments are the type of accommodation in which outbound tourists of all countries are least interested, with the exception of the Netherlands, where demand for nights in hotels and in private accommodation is smaller, and Slovenia, where demand for hotels is smaller. Tourists from most EU countries like to spend their holidays in hotels and similar establishments. Only outbound tourists from Estonia, Greece, Lithuania, Poland and Slovenia prefer to stay in private accommodation. Where nights spent in hotels are concerned, the highest shares were registered for Sweden, with 70.5%, and Finland, with 69.6% of all nights spent on outbound trips of 4 nights or more.

Table 4: Outbound holiday trips of 4 nights or more by type of accommodation, 2004 (in 1 000)

	Hotels and similar establishments	Other collective accommodation	Private tourist accommodation	Total
EU-25¹	92 469	22 581	64 855	180 733
BE	2 611	1 043	1 851	5 505
CZ	1 938	693	1 346	3 978
DK	1 729	634	906	3 269
DE	35 542	7 157	23 861	66 560
EE	:	:	70	122
EL	197	3	233	434
ES ²	1 740	328	1 351	3 295
FR	7 792	2 086	3 986	13 864
IE	960	756	911	2 627
IT	4 698	1 795	2 739	9 232
CY	:	:	:	470
LV	114	:	:	270
LT ³	137	47	339	567
LU	340	49	287	676
HU	693	162	599	1 454
MT	:	:	:	:
NL	4 552	5 138	1 830	11 520
AT	3 134	478	1 460	5 072
PL ³	980	329	1 488	3 026
PT	568	27	345	940
SI	272	400	448	1 121
SK	1 104	254	597	1 955
FI	1 317	132	443	1 892
SE	2 950	471	764	4 185
UK	19 100	600	19 000	38 700
IS	:	:	:	:
LI	:	:	:	:
NO	1 751	219	892	2 863
CH	:	:	:	:
BG	:	:	:	1 074
HR	:	:	:	:
RO	:	:	:	:

1) EU-25 values including only data of countries with values in the category.

2) "Type of accommodation not specified" included in one of the 3 categories but not in the total.

3) "Type of accommodation not specified" not included in one of

Note: Estimates for EL (based on 2004 total and ratios in 2002), 2003 data for DK and IE. Preliminary data for IT. Estimated data for PL.

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

Schematic map

The map gives information on the tourist's country of origin (indicated by the symbol •), the main country of destination (indicated by an arrow - ► - ending in that country) and by a % sign close to the bullet to indicate the share of the destination among total outbound tourism from the country of origin.

Tourism

Defined as: the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes. In relation to a given country, three forms of tourism can be distinguished:

- (i) Domestic tourism comprises the activities of residents of a given country travelling to and staying in places only within that country but outside their usual environment;
- (ii) Inbound tourism comprises the activities of non-residents of a given country travelling to and staying in places in that country and outside their usual environment;
- (iii) Outbound tourism comprises the activities of residents of a given country travelling to and staying in places outside that country and outside their usual environment.

Hotels and similar establishments

Hotels

Comprise hotels, apartment hotels, motels, roadside inns, beach hotels, residential clubs and similar establishments providing hotel services including more than just daily bed-making and cleaning of the room and sanitary facilities.

Similar establishments

Comprise rooming and boarding houses, tourist residence and similar accommodation arranged in rooms and providing limited hotel services including daily bed-making and cleaning of the room and sanitary facilities. This group also includes guest houses, Bed & Breakfast and farmhouse accommodation.

Other collective accommodation establishments

Holiday dwellings

Include collective facilities under common management, such as clusters of houses or bungalows arranged as dwelling-type accommodation and providing limited hotel services (not including daily bed-making and cleaning).

Tourist camp-sites

Consist of collective facilities in enclosed areas for tents, caravans, trailers and mobile homes. All come under common management and provide some tourist services (shop, information, and recreational activities).

Other collective establishments n.e.c.

Comprise 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.

Private tourist accommodation

Accommodation types that do not conform to the definition of "establishments".

The figures for this category should be considered with caution, because not all Member States use the same methods for their collection.

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 (his/her physical presence there being unnecessary) in a collective accommodation establishment or in private tourist accommodation. Overnight stays are calculated by country of residence of the guest and by month.

Arrivals of residents and non-residents

An arrival (departure) is defined as a person who arrives at (leaves) a collective accommodation establishment or private tourist accommodation and checks in (out). The arrivals of same-day visitors spending only a few hours during the day (no overnight stay, the date of arrival and departure are the same) at the establishment are excluded from accommodation statistics.

Country abbreviations:

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

Symbols:

:	data not available
bn	10 ⁹
mio	10 ⁶

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

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