

How Europeans go on holiday

Statistics in focus

INDUSTRY, TRADE AND SERVICES

POPULATION AND SOCIAL CONDITIONS

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Main features

- In 2004, European tourists made on average at least two holiday trips of 4 nights or more.
- At EU level, domestic trips exceed trips abroad.
- EU tourists prefer to go on holiday between July and September.
- Shorter trips are preferred to longer trips in many EU Member States.
- Private cars are the main means of transport for EU tourists.
- The majority of EU tourists favour private accommodation.
- European tourists prefer to organise their trips independently.

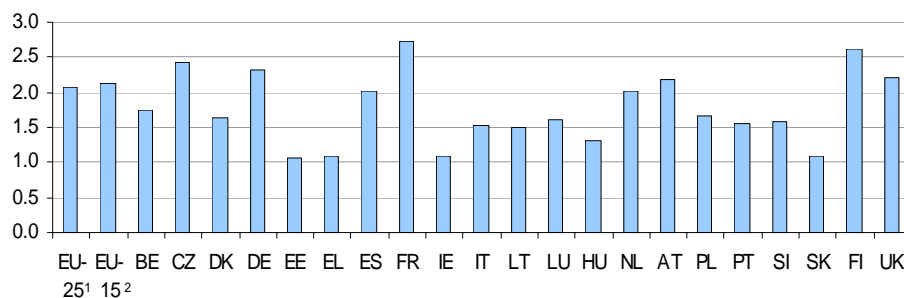
EU average - two trips per year per tourist

This publication deals with the travel behaviour of European tourists. It examines whether tourists prefer to stay in their own country or go abroad, how they reach their holiday destinations, what kind of accommodation they prefer and how they organise their holidays.

Figure 1 presents the average number of trips (here, holidays of four nights or more) made within a year by EU tourists (above the age of 14). In 2004, about 197 million EU citizens made about 408 million trips, of which tourists from EU-15 Member States accounted for more than 90%. This works out as an average of 2.1 trips per tourist at EU level.

In eight EU Member States, tourists made at least 2 trips lasting 4 nights or more in 2004. The EU average of 2.1 trips per tourist was due mainly to the high values for Member States with a large population such as France (2.7 trips) Germany (2.3 trips) and the United Kingdom (2.2 trips). With 1.1 trips per tourist, Estonia and Slovakia together with Greece and Ireland had the smallest values, followed by Hungarian tourists with 1.3 trips and Lithuanians with 1.5 trips.

Figure 1: Average number of trips per tourist, 2004



1) EU-25 excluding CY, LV, MT and SE. 2) EU-15 excluding SE. 3) Estimate.
Note: 2003 data for EL and IE.

The majority of tourists spend their holidays in their own country

For the EU as a whole, the proportion of holiday trips of 4 nights or more within a country (domestic trips) compared to those made outside the country (outbound trips) was about 57% to 43%. Domestic trips were more common than outbound trips in 12 out of 23 Member States. The highest percentages were recorded in southern European Member States (Greece, Spain, France, Italy and Portugal) and in Poland. Tourists from these countries made more than 75% of all holiday trips in their own country, with the highest percentages in Greece with 90.2%, Spain with 88.1% and France with 82.9%. This is mainly because the southern European Member States in particular have highly developed summer holiday destinations with a long tradition. Moreover, their residents often own holiday dwellings and like to visit friends and family in their own country.

On the other hand, far more outbound than domestic trips (over 70% of trips) were made by tourists from Luxembourg (99.3%), Belgium (78.8%), Slovenia (73.0%), Ireland (72.6%) and Denmark (69.1%), showing that Member States with higher outbound percentages are in general small.

Looking at the distribution of outbound trips for the EU as a whole, about two-thirds of all trips of 4 nights or more were spent in other EU Member States. Tourists from 17 Member States preferred to spend their outbound holidays within the EU. The largest percentages were recorded in the Benelux states (Luxembourg with 82.1%, Belgium 77.1% and the Netherlands 76.0%), Ireland (78.0%), Denmark (72.3%), the United Kingdom (72.1%) and Poland (71.9%). Outbound trips to non-European Union countries were the majority only in Slovenia (85.9%), Latvia (59.0%), Lithuania (56.8%), Greece (53.1%) and France (52.4%). For Greece and France, it has to be borne in mind that the high percentages are based on relatively low absolute numbers for outbound trips compared to domestic trips (Table 1).

Table 1: Holiday trips of 4 nights or more by destination, 2004 (%)

	Trips by destination			
	Domestic	Outbound		
	Total	Total	of which in the EU-25	of which outside the EU-25
EU-25 ¹	56.9	43.1	65.9	34.1
EU-15	55.7	44.3	66.6	33.4
BE	21.2	78.8	77.1	22.9
CZ	57.9	42.1	55.6	44.4
DK	30.9	69.1	72.3	27.7
DE	36.0	64.0	67.8	32.2
EE	50.7	49.3	:	:
EL	90.2	9.8	46.9	53.1
ES	88.1	11.9	59.1	40.9
FR	82.9	17.1	47.6	52.4
IE	27.4	72.6	78.0	22.0
IT	75.1	24.9	54.1	45.9
CY	:	:	68.7	31.3
LV	41.8	51.5	41.0	59.0
LT	38.9	61.1	43.2	56.8
LU	0.7	99.3	82.1	17.9
HU	72.8	27.2	:	:
MT	:	:	:	:
NL	37.7	62.3	76.0	24.0
AT	35.3	64.7	59.2	40.8
PL ²	81.8	18.2	71.9	28.1
PT	77.4	22.6	67.1	32.9
SI	27.0	73.0	14.1	85.9
SK	56.6	43.4	53.8	46.2
FI	69.5	30.5	58.9	41.1
SE	52.5	47.5	65.6	34.4
UK	41.4	58.6	72.1	27.9

1) EU-25 excluding CY (only for domestic and total outbound) and MT; EE and HU only for geographical breakdown.

2) Estimate.

Note: 2003 data for EL and LV.

Summer is the main holiday period in all EU Member States

In 2004, the most popular holiday period in all EU Member States was the summer (July to September). Especially high preferences for this period, with percentages of about 60%, were recorded for tourists from the Czech Republic, Spain, Italy and Slovenia.

The smallest number of tourist trips were made in either the first (January to March) or the fourth quarter (October to December) of the year, with ten Member States for each period (data available only for 20 countries). The values for January to March ranged from 7.8% in Greece to 16.3% in Denmark, while the shares for October to December were slightly higher,

ranging between 10.3% for Italians and 18.4% for tourists from Luxembourg.

The percentage differences between the values for the high and low seasons give an indication of the seasonal preferences of holiday-makers. The reporting Member States can be divided into three groups: seven with fairly balanced seasonal preferences (differences of 20 to 30 percentage points), eight with moderate seasonal peak periods (31 to 45) and five with a significant preference for one season (46 and more). The first group, with Denmark, Germany, Ireland, Luxembourg, the Netherlands, Finland and the United Kingdom, included only Member States from northern Europe, while the two other groups did not show a geographical pattern. The Czech Republic, Greece, Spain, Italy and Slovenia belonged to the group with significant peak seasons, while Belgium, France, Hungary, Austria, Poland, Portugal, Slovakia and Sweden had a more moderate seasonal distribution.

For the EU as a whole, on average 85.3% of all tourists made trips of 4 to 14 nights, with the largest proportions in Hungary (95.1%), Finland (94.2%) and Slovakia (94.0%). Although there was in general a clear orientation towards trips of 4 to 7 nights over trips of 8 to 14 nights in all Member States, the figures vary considerably between individual countries. Trips of 4 to 7 nights were more than twice as popular as trips of 8 to 14 nights in the majority of EU Member States. The highest ratios were registered for Finland (4.8 times), Estonia (4.3 times) and Hungary (3.8 times). For trips of 8 to 14 nights, Germany (38.3%) and Belgium (34.7%) stood out (Table 2).

Table 2: Seasonal preferences and length of trips, 2004 (% of holiday trips of 4 nights or more)

	High Season		Low Season		Trips by length of stay (%)		
	Quarter	%	Quarter	%	4 to 7 nights	8 to 14 nights	15 nights and more
EU-25 ¹	July-September	45.0	:	:	54.8	30.5	14.7
EU-15	July-September	44.1	:	:	54.1	30.7	14.4
BE	July-September	51.1	October-December	11.5	44.9	34.7	20.4
CZ	July-September	59.3	October-December	11.2	64.5	28.5	6.9
DK	July-September	42.8	January-March	16.3	67.5	23.0	9.5
DE	July-September	36.2	January-March	15.5	47.1	38.3	14.6
EE	:	:	:	:	73.7	17.1	9.2
EL	July-September	53.6	January-March	7.8	49.0	23.0	28.0
ES	July-September	60.7	October-December	10.5	49.6	24.1	26.2
FR	July-September	45.3	October-December	15.4	57.4	28.9	13.8
IE	July-September	39.7	January-March	15.5	59.3	29.4	11.3
IT ²	July-September	59.2	October-December	10.3	50.9	28.7	20.5
CY	:	:	:	:	:	:	:
LV	:	:	:	:	:	:	:
LT	:	:	:	:	49.2	33.2	17.6
LU	July-September	40.3	October-December	18.4	56.2	28.9	14.8
HU	July-September	53.3	January-March	10.1	75.3	19.8	4.9
MT	:	:	:	:	:	:	:
NL	July-September	41.1	January-March	14.1	48.9	29.3	21.7
AT	July-September	45.2	October-December	14.3	64.5	26.8	8.7
PL ³	July-September	53.5	October-December	13.4	56.5	29.5	14.0
PT	July-September	55.9	January-March	12.3	46.2	30.9	22.8
SI	July-September	66.0	January-March	9.6	63.0	29.4	7.6
SK	July-September	46.3	January-March	14.1	63.0	31.0	6.0
FI	July-September	37.6	October-December	17.2	77.9	16.3	5.8
SE	July-September	45.0	October-December	12.1	69.2	22.1	8.7
UK	July-September	39.0	January-March	14.4	61.2	29.1	9.7

1) EU-25 excluding CY, LV and MT; LT and EE only excluded for high and low season data. 2) Provisional. 3) Estimate.

Note: 2003 data for EL.

Europeans go on holiday mainly by car

Table 3 shows the modes of transport for all trips of 4 nights or more made by tourists in the year 2004. At EU level, private cars and air transport were the most popular means of transport with 57.5% and 25.2%, respectively. In 16 Member States, cars were used for more than half of all holiday trips. The highest values were recorded for Slovenia (82.1%), France (72.5%) and Spain (71.1%), while Irish tourists tend to make the least use of private cars for holiday purposes.

Air travel was the main means of transport in Ireland (65.9%) and the United Kingdom (50.8%) but not particularly important in Hungary, Poland, Slovenia and Greece (less than 10.0%).

Rail transport was relatively important for trips in some of the new Member States (Lithuania with 18.9%, Poland with 18.7%, Latvia with 17.0%, Hungary with 15.0%) and France (12.3%). In Lithuania and France, this means of transport ranked second among all transport modes after private cars.

Coach transport was of relatively high importance in the new Member States except Slovenia, ranging from 13.5% for Lithuania to 36.0% for Estonia.

Water transport was particularly important in Greece, accounting for more than a fifth of all transport. This is due to the large number of islands that can only be reached by ship. Compared to other Member States, Estonia also had a relatively high share of water transport, which might be linked to the good sea connections with Finland.

Table 3: Breakdown of trips by mode of transport, 2004 (%)

	Private vehicle	Air	Rail	Coach	Waterway
EU-25 ¹	57.5	25.2	8.1	7.6	1.6
EU-15 ²	57.3	27.0	7.5	6.4	1.7
BE	57.8	29.8	4.8	6.4	1.2
CZ	59.7	10.7	9.1	19.9	0.5
DK	43.3	39.0	6.6	8.7	2.3
DE	53.5	28.6	7.5	10.4	u:
EE	37.1	19.2	:	36.0	7.7
EL	55.8	8.4	1.8	13.0	21.1
ES	71.1	14.7	4.3	8.0	1.8
FR	72.5	12.1	12.3	2.4	0.6
IE	25.4	65.9	2.3	1.8	4.6
IT ³	60.9	19.0	9.3	5.0	5.8
CY	:	:	:	:	:
LV	42.6	16.4	17.0	20.0	4.0
LT	48.8	13.5	18.9	13.5	5.3
LU	52.1	37.5	4.5	4.5	1.3
HU	64.0	5.2	15.0	15.6	0.2
MT	:	:	:	:	:
NL	67.3	23.5	3.4	4.4	1.4
AT	55.4	30.5	6.5	7.0	0.7
PL ⁴	58.4	3.5	18.7	19.4	:
PT	64.6	21.5	2.8	9.1	1.9
SI	82.1	8.8	2.1	5.5	1.5
SK	47.9	14.7	11.0	26.3	0.1
FI	55.6	24.5	9.0	5.7	5.3
SE	52.0	34.5	4.2	5.8	3.5
UK	37.3	50.8	5.0	5.2	1.7

1) EU-25 excluding CY and MT; DE and PL for Waterway and EE for Rail.

2) EU-15 excluding DE for Waterway. 3) Provisional. 4) Estimate.

Note: 2003 data for EL, EE estimated (Air and Waterway only) and LV.

Southern Europeans prefer to stay in private accommodation

At EU level, private accommodation was the preferred type of accommodation for tourists on holidays lasting 4 nights or more, in terms of both nights and the number of trips, followed by hotels and other collective accommodation. Comparing trips and nights at EU level, the share of nights was significantly higher in private and other collective accommodation. This is to do with the fact that the average length of stay in these two forms of accommodation is higher than in hotels. Consequently, the share of hotels in total accommodation was smaller in terms of nights than in terms of trips. However, the respective shares of these three types of accommodation as a proportion of total nights differed enormously depending on the Member States.

In terms of nights, private accommodation was the most popular type for tourists from all Member States except from the Netherlands, with percentages ranging from 39.9% for Danish tourists to 86.2% for Greek tourists. Indeed, tourists from 11 EU Member States spent more than half of their total holiday nights in private accommodation. The Dutch were the only tourists who largely preferred to stay in other collective establishments. This category includes holiday dwellings, campsites, youth hostels and group accommodation facilities. In 2004, they spent 56.5% of total nights in such establishments, more than twice the number they spent in hotels. Compared to other EU tourists, the Slovenians with 35.5%, the Irish with 25.6% and the Danish with 25.0% also spent a relatively high proportion of nights in other collective establishments.

Table 4: Trips and nights by type of accommodation, 2004 (%)

	Hotels		Other collective establishments		Private accommodation	
	Trips	Nights	Trips	Nights	Trips	Nights
EU-25 ¹	33.1	28.1	12.5	13.4	54.4	58.5
EU-15 ²	34.0	28.5	12.0	13.1	53.9	58.4
BE	40.7	33.2	18.0	17.1	41.3	49.7
CZ	29.5	28.1	20.5	17.6	50.0	54.4
DK	44.8	35.1	21.5	25.0	33.6	39.9
DE	45.1	40.8	8.6	10.0	46.2	49.2
EE	17.9	:	9.0	:	73.1	:
EL	17.3	12.1	2.3	1.8	80.4	86.2
ES	25.1	13.9	8.5	6.0	66.4	80.0
FR	18.3	16.1	13.2	14.7	68.4	69.2
IE	35.6	30.8	22.8	25.6	41.6	43.6
IT ³	34.6	25.0	11.9	11.2	53.5	63.8
CY	:	:	:	:	:	:
LV	:	:	:	:	:	:
LT	19.1	17.1	12.8	6.9	68.1	76.0
LU	50.3	42.1	7.1	7.3	42.6	50.7
HU	27.1	:	10.6	:	62.3	:
MT	:	:	:	:	:	:
NL	27.5	25.2	54.6	56.5	17.8	18.3
AT	57.0	:	9.0	:	34.0	:
PL ⁴	15.0	14.9	14.8	15.3	70.2	69.8
PT	24.2	18.5	5.3	4.0	70.5	77.5
SI	24.6	21.9	36.1	35.5	39.3	42.6
SK	37.8	40.3	20.0	17.5	42.2	42.2
FI	26.6	27.4	7.3	9.8	66.1	62.8
SE	41.0	39.9	21.3	17.5	37.6	42.6
UK	38.8	34.4	4.5	7.9	56.7	57.7

1) EU-25 excluding CY, LV and MT; EE, HU and AT (only nights). 2) EU-15 excluding AT (only nights). 3) Provisional. 4) Estimate.

Note: 2003 data for EL and for DK (only nights).

The majority of tourists organise their trips independently

Figure 2 shows the main methods used for organising trips in 20 out of 25 EU Member States. Looking at the EU as a whole, direct reservation was the most popular method in 2004 with about 40% of all trips, followed by "no type of organisation". This might be partly due to the high density of personal computers with an Internet connection in private households, which has increased substantially in recent years and allows tourists to obtain detailed information by themselves about trips and accommodation. However, there were huge differences between Member States. Direct reservation recorded percentages of between 8.9% for Polish and 94.5% for Greek tourists. The largest percentages, with more than 20 percentage points above the EU average of 40.1%, were recorded for Czech (72.0%), Danish (71.4%), Austrian (70.7%), German (68.1%), Estonian (66.0%), Irish (62.0%) and Luxembourg (61.0%) tourists.

Regarding the organisation of trips by travel agencies and tour operators, the largest values were found for Swedish (50.3%) and Dutch (35.3%) tourists.

Looking in detail at the category of trips organised by travel agencies/tour operators (Table 5), the breakdown by package tours and other forms of travel differs enormously between Member States. For the EU as a whole, more than two-thirds of all trips booked via travel agents/tour operators were packages. Almost half of the countries for which data were available had values above the average, with the highest percentages for Czech (88.8%), German (86.4%), Hungarian (86.1%) and Estonian (83.3% - 2003 value) tourists. The lowest values were recorded in Austria with 18.9% and Greece with 30.7% (both values for 2003). Regarding other forms of travel booked via travel agents, the Czech Republic, Estonia, Hungary, Germany, Finland and Sweden had the smallest percentages.

Table 5: Breakdown of trips organised by travel agents, 2004 (%)

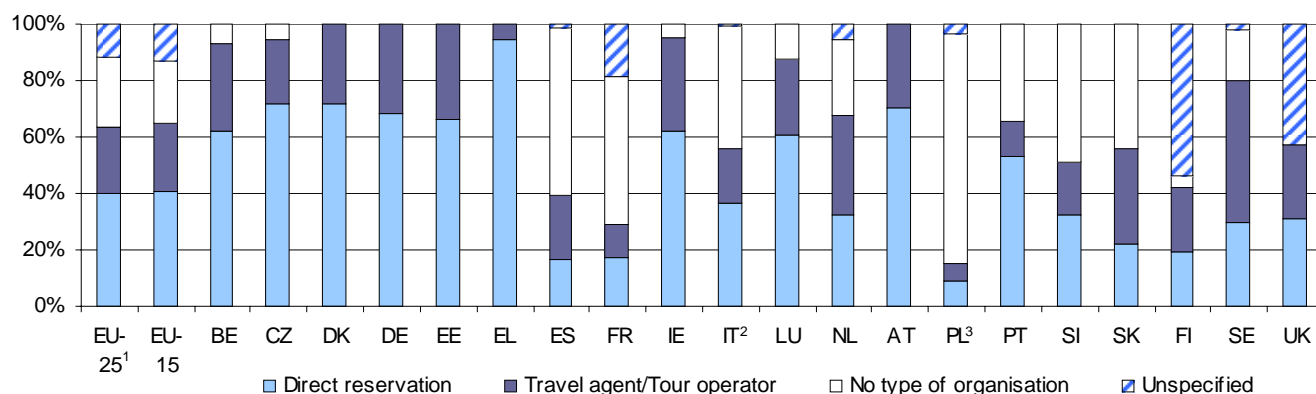
	Travel agent/Tour operator		
	Total (in % of total trips)	Package	Other forms of organisation
EU-25 ¹	23.7	69.4	30.6
EU-15	24.2	68.6	31.4
BE	31.1	66.7	33.3
CZ	22.7	88.8	11.2
DK ²	28.6	66.4	33.6
DE	31.9	86.4	13.6
EE	34.0	83.3	16.7
EL	5.5	30.7	69.3
ES	22.8	45.3	54.7
FR	11.9	55.5	44.5
IE	33.0	55.5	44.5
IT ³	19.4	67.1	32.9
CY	:	:	:
LV	:	:	:
LT	:	:	:
LU	26.8	45.9	54.1
HU	:	86.1	13.9
MT	:	:	:
NL	35.3	53.4	46.6
AT	29.3	18.9	81.1
PL ⁴	6.5	73.8	26.2
PT	12.3	38.6	61.4
SI	18.8	52.3	47.7
SK	33.9	80.0	20.0
FI	22.3	81.1	18.9
SE	50.3	83.2	16.8
UK	25.9	64.3	35.7

1) EU-25 excluding CY, LV, LT and MT. 2) 2003 values for package and other.

3) Provisional. 4) Estimate.

Note: 2003 data for EL, EE and AT.

Figure 2: Trips by type of organisation, 2004 (%)



1) EU-25 excluding CY, LV, LT, HU and MT. 2) Provisional. 3) Estimate.
Note: 2003 data for EL, EE and AT.

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

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.

Tourist

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

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 residences 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". Includes second homes.

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

Tourism trip

Trip made by a tourist, i.e. an overnight trip. Each trip has one main purpose but may have secondary reasons, several visits with possibly different purposes and several activities.

Tourism night

A tourism night (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 tourism accommodation.

Length of stay

The length of stay for overnight trips is defined as nights spent.

Package travel

Combination of travel services, arranged in advance, which includes at least transport and accommodation or one of these and some other essential tourism service.

Country abbreviations:

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

Symbols:

: data not available

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Tourism

Tourism

-  Capacity of collective tourist accommodation : local units on national territory
-  Occupancy in collective accommodation establishments : domestic and inbound tourism
-  Tourism demand : domestic and outbound tourism (excluding day-trips)

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