

# Tourism

## Statistical pocketbook

**Data 2001-2004**



THEME  
Population and  
social conditions



THEME  
Industry, trade  
and services

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## Preface

This pocketbook is the first in a series of Eurostat pocketbooks containing statistics on tourism. It provides key facts and figures on tourism in Europe and information on recent policy issues.

The data have been directly taken or derived from Eurostat databases. They are collected according to Council Directive 95/57/EC on the collection of statistical information in the field of tourism (the "Tourism Directive") or other official data collections such as Structural Business Statistics, the Labour Force Survey, National Accounts, etc. The data cover the period from 2001 to 2004 and include information on all EU Member States, Candidate countries and EFTA countries.

The data are presented from two main viewpoints. The first part contains the general information needed to evaluate the importance of the tourism sector in relation to the economy as a whole. The second part contains data that are specific to tourism and presents detailed information by country. It covers the tourism market, including both domestic and outbound tourism and provides country profiles for 33 countries, which include data on recent trends and figures on supply and demand in tourism.

Methodological notes, a list of data sources and other useful information for understanding tourism statistics are supplied in an annex.

Eurostat plans to publish the Pocketbook on Tourism annually, adding to it with each edition.

Bettina Knauth

Head of Unit  
Eurostat F6 "Information Society and Tourism Statistics"

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## Production

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## Chapter 1 - General Data - Demographic and Economic Trends

## 1.1 Population (in 1 000) by age groups 2001

	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT
Total	452 050	10 263	10 267	5 349	82 260	1 367 <sub>p</sub>	10 931	40 376	59 043	3 833	56 968	698	2 364	3 487	439	10 200	391 <sub>e</sub>
0-14	76 744	1 805	1 664	994	12 777	242 <sub>p</sub>	1 651	5 923	11 102	828	8 124	156	410	687	83	1 692	77 <sub>e</sub>
15-24	58 491	1 243	1 535	605	9 257	200 <sub>p</sub>	1 565	5 760	7 663	639	6 548	110	341	502	51	1 480	59 <sub>e</sub>
25-49	166 271	3 746	3 723	1 943	30 959	474 <sub>p</sub>	3 988	15 406	21 079	1 376	21 194	247	827	1 244	174	3 637	136 <sub>e</sub>
50-64	78 643	1 739	1 922	1 015	15 572	242 <sub>p</sub>	1 892	6 456	9 678	562	10 603	107	426	563	70	1 847	70 <sub>e</sub>
65+	71 902	1 730	1 423	792	13 694	208 <sub>p</sub>	1 836	6 832	9 522	429	10 499	79	360	491	61	1 545	48 <sub>e</sub>

	NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR
Total	15 987	8 021	38 254	10 257	1 990	5 379	5 181	8 883	59 863 <sub>e</sub>	283	33 <sub>e</sub>	4 503	7 204	7 929	4 437	22 430	:
0-14	2 978	1 359	7 294	1 641	313	1 034	936	1 631	11 343	66	6	902	1 247	1 217	758	4 047	:
15-24	1 893	955	6 471	1 465	289	916	659	1 025 <sub>e</sub>	7 260	43	4	541	834	1 113	607	3 584	:
25-49	6 142	3 061	13 876	3 725	764	1 998	1 813	3 020 <sub>e</sub>	21 716	103	13	1 637	2 724	2 752	1 581	8 147	:
50-64	2 799	1 408	5 887	1 748	342	815	995	1 676 <sub>e</sub>	10 211	39	6	745	1 290	1 518	795	3 634	:
65+	2 175	1 238	4 726	1 677	281	616	777	1 531	9 333 <sub>e</sub>	33	3 <sub>e</sub>	679	1 109	1 329	697	3 017	:



## 1.1 Population (in 1 000) by age groups

2002

	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT
Total	:	10 310	10 206	5 368	82 440	1 361	10 969	40 851	59 343	3 900	56 994	706	2 346	3 476	444	10 175	395e
0-14	:	1 805	1 622	1 005	12 619	234	1 626	5 941	11 110	827	8 109	152	390	660	84	1 660	76p
15-24	:	1 246	1 484	599	9 395	202	1 517	5 615	7 725	641	6 345	109	346	512	51	1 437	59p
25-49	:	3 747	3 710	1 941	30 818	472	4 039	15 801	20 963	1 419	21 255	252	823	1 242	176	3 653	138e
50-64	:	1 765	1 976	1 029	15 543	242	1 900	6 551	9 912	578	10 630	110	422	560	72	1 873	73p
65+	:	1 746	1 415	795	14 066	211	1 887	6 943	9 632	435	10 655	82	364	502	62	1 552	50e

	NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR
Total	16 105	8 065p	38 242	10 329	1 994	5 379	5 195	8 909	:	287	34	4 524	7 256	7 892	:	21 833b	:
0-14	2 998	1 346	7 039	1 640	307	1 007	932	1 620	:	66	6	906	1 225	1 182	:	3 857	:
15-24	1 913	965	6 463	1 427	284	912	655	1 035	:	43	4	541	844	1 103	:	3 409	:
25-49	6 130	3 073	13 851	3 784	766	2 008	1 800	3 020	:	104	14	1 637	2 750	2 756	:	7 915	:
50-64	2 865	1 432	6 078	1 770	350	839	1 021	1 702	:	40	6	764	1 306	1 515	:	3 610	:
65+	2 199	1 250p	4 811	1 709	289	613	787	1 532	:	33	4	676	1 131	1 336	:	3 043b	:

## 1.1 Population (in 1 000) by age groups

2003

	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT
Total	:	10 356	10 203	5 384	82 537	1 356	11 006	41 551	59 635e	3 964	57 321	715	2 331	3 463	448	10 142	397
0-14	:	1 803	1 590	1 013	12 416	225	1 610	6 024	11 119e	832	8 147	149	373	633	84	1 634	74
15-24	:	1 250	1 439	595	9 514	205	1 461	5 507	7 757e	643	6 186	112	352	521	51	1 393	59
25-49	:	3 745	3 724	1 934	30 654	470	4 089	16 305	20 867e	1 451	21 424	256	821	1 239	177	3 660	139
50-64	:	1 795	2 032	1 043	15 514	241	1 918	6 694	10 164e	597	10 664	114	416	560	73	1 897	75
65+	:	1 762	1 418	798	14 439	215	1 929	7 020	9 728e	441	10 901	85	370	510	63	1 559	51

	NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR
Total	16 193	8 102p	38 219b	10 407	1 995	5 379	5 206	8 941	:	288	34	4 552	7 314	7 846	4 442e	21 773	70 171e
0-14	3 010	1 339p	6 804b	1 646	299	975	927	1 612	:	66	6	910	1 222	1 143	736	37 08	20 692
15-24	1 932	978p	6 428b	1 391	279	899	650	1 049	:	43	4	547	853	1 089	602	3 398	13 202
25-49	6 095	3 077p	13 814b	3 838	763	2 017	1 784	3 018	:	104	14	1 637	2 766	2 754	1 578	7 948	25 289
50-64	2 935	1 455p	6 285b	1 797	359	872	1 046	1 728	:	42	6	785	1 331	1 523	803	3 630	7 089
65+	2 220	1 253p	4 888b	1 736	295	616	799	1 534	:	34	4	674	1 142	1 336	723e	3 090	3 899e

## 1.1 Population (in 1 000) by age groups

2004

	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT
Total	456 864	10 396	10 211	5 398	82 532	1 351	11 041	42 345	59 901	4 028e	57 888e	730	2 319	3 446	452	10 117	400
0-14	74 780	1 797	1 554	1 018	12 162	216	1 599	6 151	11 125	841e	8 217	146	357	609	85	1 606	73
15-24	58 133	1 256	1 404	594	9 622	208	1 420	5 397	7 794	640e	6 157	115	357	526	52	1 355	59
25-49	166 978	3 741	3 749	1 926	30 474	469	4 127	16 788	20 776	1 484e	21 713	264	820	1 237	177	3 653	140
50-64	81 683	1 822	2 080	1 056	15 414	239	1 923	6 865	10 399	614e	10 680	118	410	556	75	1 935	77
65+	75 290	1 780	1 423	805	14 860	:	:	7 103	:	449e	11 122e	87	375	518	64	1 567	52

	NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR
Total	16 258	8 140p	38 191	10 475	1 996	5 380	5 220	8 976	59 673	291	34	4 577	7 364	7 801	:	21 711	71 254e
0-14	3 016	1 329	6 580	1 649	292	944	920	1 599	10 895	66	6	911	1 214	1 106	:	3 566	20 888
15-24	1 941	994	6 373	1 361	275	886	651	1 073	7 623	43	4	554	865	1 077	:	3 382	13 072
25-49	6 056	3 082	13 786	3 886	762	2 027	1 771	3 012	21 058	104	14	1 634	2 777	2 750	:	7 984	25 940
50-64	2 994	1 471	6 501	1 818	368	902	1 065	1 750	10 551	44	6	804	1 353	1 534	:	3 646	7 334
65+	2 251	1 264p	4 951	1 761	300	620	813	1 541	9 546	34	4	674	1 157	1 334	:	3 133	4 019e

## 1.2 Gross domestic product at current market prices

Total in mio. Euro

	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT
2001	9 410 765	254 153	67 960	179 226	2 113 160	6 676	131 317	679 848	1 497 184	117 114	1 218 535	10 599	9 227	13 505	22 020	57 874	4 204
2002	9 752 376	261 124	78 388	181 790	2 145 020	7 472	141 669	729 004	1 548 555	130 515	1 260 598	11 073	9 792	14 928	22 806	68 902	4 257
2003	9 893 341	269 546	80 254	187 134	2 163 400	8 138	153 472	780 557	1 585 172	139 097	1 300 929	11 651	9 861	16 271	23 956	72 584	4 195
2004	10 357 846	283 752	86 239	194 421	2 215 650	9 043	165 281	837 557	1 648 369	148 557	1 351 328	12 402	11 024	17 926	25 664	80 816	4 277
	NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR
2001	447 731	215 878	207 128	127 769	21 845	23 322	136 472	245 178	1 602 840	8 472	:	189 632	279 699	15 250	22 138	44 904	161 836
2002	465 214	220 688	202 497	133 828	23 518	25 733	140 853	256 840	1 667 312	8 891	:	202 319	293 474	16 589	24 199	48 442	192 803
2003	476 349	226 968	185 227	135 822	24 576	28 952	143 807	267 251	1 598 172	9 204	:	195 159	285 671	17 725	25 508	50 688	212 268
2004	488 642	237 039	195 206	141 115	25 895	33 119	149 725	279 008	1 715 791	9 857	:	201 387	288 853	19 459	27 623	58 947	239 895f

## 1.2 Gross domestic product at current market prices (%)

Index EU-25=100

	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT
2001	100.0	2.70	0.72	1.90	22.45	0.07	1.40	7.22	15.91	1.24	12.95	0.11	0.10	0.14	0.23	0.61	0.04
2002	100.0	2.68	0.80	1.86	21.99	0.08	1.45	7.48	15.88	1.34	12.93	0.11	0.10	0.15	0.23	0.71	0.04
2003	100.0	2.72	0.81	1.89	21.87	0.08	1.55	7.89	16.02	1.41	13.15	0.12	0.10	0.16	0.24	0.73	0.04
2004	100.0	2.74	0.83	1.88	21.39	0.09	1.60	8.09	15.91	1.43	13.05	0.12	0.11	0.17	0.25	0.78	0.04

	NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR
2001	4.76	2.29	2.20	1.36	0.23	0.25	1.45	2.61	17.03	0.09	:	2.02	2.97	0.16	0.24	0.48	1.72
2002	4.77	2.26	2.08	1.37	0.24	0.26	1.44	2.63	17.10	0.09	:	2.07	3.01	0.17	0.25	0.50	1.98
2003	4.81	2.29	1.87	1.37	0.25	0.29	1.45	2.70	16.15	0.09	:	1.97	2.89	0.18	0.26	0.51	2.15
2004	4.72	2.29	1.88	1.36	0.25	0.32	1.45	2.69	16.57	0.10	:	1.94	2.79	0.19	0.27	0.57	2.32f

## Annual average growth rate (%)

	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT
2001/2004	2.46	2.79	6.14	2.06	1.19	7.88	5.92	5.35	2.43	6.13	2.62	4.01	4.55	7.34	3.90	8.71	0.43

	NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR
2001/2004	2.21	2.37	-1.47	2.51	4.34	9.16	2.34	3.28	1.72	3.86	:	1.51	0.81	6.28	7.66	7.04	10.34

## 1.3 Consumer price indices (EU-25=100)

	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT
2001	100	98	117	99	95	121	108	101	95	104	99	102	108	105	98	160	104
2002	100	97	117	99	94	122	109	102	95	106	100	103	108	104	98	165	105
2003	100	97	114	99	94	122	111	104	95	109	101	105	109	101	99	169	105
2004	100	96	115	98	93	123	112	104	95	109	101	105	114	99	100	177	105

	NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR
2001	102	96	143	102	131	134	98	96	96	105	:	101	:	714	:	1 037	:
2002	104	95	143	104	138	136	98	96	95	108	:	100	:	740	:	1 244	:
2003	104	95	141	105	143	145	98	97	94	108	:	100	:	743	:	1 406	:
2004	103	95	143	105	145	152	96	95	94	108	:	98	:	772	:	1 540	:

## Annual rate of change (%)

	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT
2003/2004	2.1	1.9	2.6	0.9	1.8	3.0	3.0	3.1	2.3	2.3	2.3	1.9	6.2	1.1	3.2	6.8	2.7

	NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR
2003/2004	1.4	2.0	3.6	2.5	3.6	7.4	0.1	1.0	1.3	2.3	:	0.6	:	6.1	:	11.9	:

## 1.4 Imports and exports at current prices (mio. Euro)

Imports	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT
2001	3 331 217	209 166	46 907	72 834	693 090	5 835	42 354	210 559	403 814	98 657	328 412	5 775	4 768	7 478	29 873	43 386	3 691
2002	3 304 699	206 918	49 831	70 688	668 450	6 081	41 503	213 626	393 405	99 524	327 420	5 774	5 016	8 756	28 505	46 229	3 604
2003	3 310 114	209 501	51 706	68 389	685 100	6 663	4 4112	223 214	390 152	94 087	328 419	5 634	5 438	9 376	28 437	49 354	3 578
2004	3 590 742	228 722	62 169	74 583	733 380	7 785	48 708	245 532	424 017	100 687	348 997	6 296	6 587	10 579	31 970	54 994	3 562
	NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR
2001	257 267	97 894	64 966	50 261	12 737	19 017	43 120	96 842	482 514	3 511	:	54 273	114 097	9 629	12 064	18 445	50 672
2002	256 820	96 912	66 764	49 069	13 195	20 291	42 762	96 149	487 407	3 390	:	55 517	109 405	9 912	13 232	19 926	59 202
2003	256 556	101 709	68 409	47 639	13 886	22 925	44 168	99 035	452 627	3 613	:	54 134	105 271	11 174	14 496	22 230	65 100
2004	279 993	109 275	79 880	51 931	15 679	26 326	48 499	106 720	483 871	4 213	:	59 487	112 296	13 367	15 377	27 418f	83 538f
Exports	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT
2001	3 407 898	217 879	45 184	84 734	735 600	5 607	31 225	193 964	421 006	116 975	345 943	5 950	3 840	6 751	33 708	42 531	3 523
2002	3 449 466	218 522	48 225	81 042	765 570	5 550	29 505	198 986	419 947	121 723	340 347	5 639	4 023	7 924	32 758	44 631	3 650
2003	3 430 934	219 701	49 930	79 976	772 660	6 050	30 456	205 621	407 729	116 379	336 097	5 496	4 172	8 434	32 924	46 086	3 388
2004	3 706 395	237 029	61 874	84 510	842 840	7 092	34 558	215 291	428 148	123 519	359 979	5 819	4 844	9 451	37 522	52 604	3 245
	NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR
2001	280 002	103 270	57 347	37 155	12 591	17 113	54 210	112 605	439 185	3 425	:	86 638	126 294	8 474	10 725	14 965	54 562
2002	279 528	107 520	59 991	37 803	13 543	18 463	54 001	113 342	437 233	3 549	:	83 156	129 596	8 814	10 977	17 166	56 356
2003	279 408	109 777	63 808	38 457	13 878	22 494	53 104	117 055	407 854	3 327	:	80 600	125 681	9 492	12 013	18 242	58 115
2004	305 195	120 874	76 348	41 700	15 521	25 436	56 631	129 113	427 252	3 628	:	88 037	132 137	11 370	13 117	21 810f	69 803f

## 1.5 Employment

2001	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT
Total (in 1000)	190 598	4 039	4 681	2 717	36 528	576	4 103	16 076	23 678	1 722	21 373	310	962	1 373	185	3 859	147
agriculture as % of total	5.59	1.39	4.87	3.53	2.62	6.94	16.11	6.56	4.07	7.08	5.21	4.84	15.07	17.55	1.62	6.19	2.04
industry as % of total	29.22	25.48	40.50	25.32	32.78	34.20	23.03	31.46	26.03	28.92	31.74	23.55	26.30	26.66	21.62	34.41	31.29
services as % of total	64.89	73.14	54.58	70.92	64.60	59.03	60.86	61.99	69.88	63.94	63.06	71.29	58.52	55.79	76.76	59.39	66.67
	NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR
Total (in 1000)	8 065	3 745	14 252	5 101	914	2 116	2 403	4 339	27 334	158	:	2 276	3 938	2 756	:	10 807	:
agriculture as % of total	2.95	5.79	19.20	13.08	9.85	6.24	5.83	2.63	1.39	7.59	:	4.09	4.32	9.69	:	44.42	:
industry as % of total	20.38	29.59	30.73	33.42	38.18	37.05	27.01	23.69	24.58	22.78	:	21.75	24.33	32.73	:	25.84	:
services as % of total	71.16	64.62	50.07	53.48	50.88	56.66	66.87	73.45	73.74	68.99	:	74.12	68.74	57.47	:	29.73	:
2002	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT
Total (in 1000)	191 643	4 052	4 733	2 741	36 275	581	4 190	16 597	23 885	1 764	21 757	315	987	1 421	188	3 868	149
agriculture as % of total	5.47	1.80	4.88	3.21	2.49	6.54	15.47	6.03	4.13	7.03	4.93	5.40	15.30	18.65	2.13	6.13	2.01
industry as % of total	28.62	25.79	40.08	23.42	32.37	30.81	22.79	31.20	25.39	27.61	31.59	23.17	25.53	27.38	20.21	34.13	31.54
services as % of total	65.47	72.43	54.91	73.11	65.15	62.65	61.74	62.77	70.46	65.36	63.48	71.75	59.17	53.98	78.19	59.75	66.44
	NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR
Total (in 1000)	8 176	3 716	13 820	5 158	922	2 111	2 406	4 348	27 483	156	:	2 293	3 965	2 800	1 521	9 768	:
agriculture as % of total	2.67	5.76	19.63	12.50	9.65	6.58	5.53	2.53	1.39	7.69	:	3.92	4.24	10.68	15.52	37.70	:
industry as % of total	19.01	29.60	28.54	33.39	38.50	38.13	27.10	22.93	23.86	22.44	:	21.67	23.1	32.64	29.78	29.59	:
services as % of total	68.95	64.67	51.83	54.09	51.30	55.23	67.17	74.38	74.54	69.87	:	74.31	69.16	56.57	54.64	32.71	:



## 1.5 Employment

2003	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT
Total (in 1000)	192 767	4 055	4 703	2 704	35 927	589	4 287	17 241	24 140	1 793	22 057	327	1 004	1 473	188	3 924	149
agriculture as % of total	5.27	1.73	4.51	3.29	2.42	6.28	15.30	5.71	4.37	6.53	4.72	5.20	14.54	18.74	2.66	5.38	2.68
industry as % of total	28.15	24.91	39.87	23.11	31.38	31.24	22.53	30.89	24.8	27.72	31.77	22.94	26.79	27.22	19.15	33.38	29.53
services as % of total	66.32	73.34	55.6	73.41	66.20	62.48	62.16	63.40	70.37	65.76	63.52	71.87	58.57	54.04	78.19	61.21	67.79
	NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR
Total (in 1000)	8 125	3 746	13 657	5 118	896	2 167	2 401	4 352	27 744	157	:	2 265	3 963	2 876	1 538	9 368	:
agriculture as % of total	2.94	5.66	18.20	12.84	8.37	6.00	5.25	2.55	1.25	7.01	:	3.84	4.19	11.13	16.84	37.68	:
industry as % of total	19.22	29.82	28.55	32.77	36.94	38.12	26.57	22.56	23.26	21.66	:	21.63	22.28	32.09	30.23	29.13	:
services as % of total	74.39	64.52	53.25	54.38	54.13	55.84	67.72	74.77	75.31	71.34	:	74.39	70.48	56.68	52.86	33.18	:
2004	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT
Total (in 1000)	193 874	4 144	4 682	2 742	35 463	595	4 331	17 866	24 388	1 836	22 438	336	1 021	1 437	186	3 894	146
agriculture as % of total	4.99	2.22	4.44	3.28	2.35	5.38	12.61	5.48	3.75	6.37	4.20	5.06	13.32	16.28	2.15	5.26	2.05
industry as % of total	27.81	24.93	39.3	23.63	31.25	35.13	22.47	30.44	24.82	27.56	30.84	23.51	27.23	28.32	19.89	32.95	29.45
services as % of total	66.93	72.85	56.26	72.87	66.39	59.5	64.9	64.08	71.02	66.01	64.95	71.73	59.45	55.39	77.96	61.79	68.49
	NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR
Total (in 1000)	8 101	3 742	13 682	5 125	946	2 149	2 384	4 311	27 929	156	:	2 273	3 959	2 970	1 583	9 283	:
agriculture as % of total	3.16	4.97	17.61	12.08	9.62	5.07	4.99	2.48	1.27	6.41	:	3.56	3.86	10.74	16.93	32.58	:
industry as % of total	19.12	28.17	29.04	31.24	35.94	39.13	25.96	22.34	22.20	23.08	:	20.77	22.13	32.86	29.63	31.06	:
services as % of total	72.93	66.84	53.35	56.66	53.28	55.56	68.67	75.09	76.26	70.51	:	75.58	71.18	56.23	53.38	36.37	:



## Chapter 2 - Tourism Industry

## 2.1 Tourism statistics - Number of enterprises

### Hotels and similar establishments

	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT
2001	202 186	2 034	3 576	475	38 529	353	8 342	16 369	19 928	5 222	33 421	801	199	231	309	1 994	223
2002	203 026	2 010	5 087	477	38 129	193	8 329	16 732	19 889	5 009	33 411	813	223	247	316	2 167	197
2003	200 219	1 957	4 374	471	37 547	230	8 689	17 102	18 217	4 821	33 480	829	261	270	307	2 261	204
2004	:	:	4 404	480	36 884	267	8 899	17 402p	:	:	:	803	:	317	297	1 797p	188
Annual average growth rate (%) 2001/2004 1																	
	-0.49	-1.91	7.19	0.35	-1.44	-8.89	2.18	2.06	-4.39	-3.92	0.09	0.08	14.52	11.13	-1.31	-3.41	-5.53
	NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR
2001	2 858	15 293	1 391	1 781	381	764	989	1 979	44 744	248	47	1 160	5 701	679	694	2 681	1 989
2002	2 933	14 914	1 478	1 898	393	816	971	1 737	44 657	273	50	1 124	5 643	755	788	:	:
2003	2 908	14 708	1 547	1 934	381	838	992	1 765	44 126	283	46	1 099	:	849	832	:	:
2004	3 129	14 435	2 139p	:	350	873	961	1 833	:	303	45	1 079	:	1 016	:	:	:
Annual average growth rate (%) 2001/2004 1, 2																	
	3.07	-1.91	15.42	4.21	-2.79	4.55	-0.95	-2.52	-0.69	6.90	-1.44	-2.38	-1.02	14.38	9.49	:	:

1) Average annual growth rate 2001/2003 for EU-25, BE, FR, IE, IT, LV, PT, UK and HR.

2) Growth rate 2001/2002 for CH.

## 2.1 Tourism statistics - Number of enterprises

### Other accommodation establishments

	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT
2001	:	1 656	3 437	624	17 352	:	342	5 504	9 258	2 814	94 860	123	75	262	282	1 050	4
2002	186 397	1 638	4 011	623	17 508	227	337	12 344	9 198	2 803	80 304	133	74	229	284	1 210	2
2003	192 078	1 601	3 837	627	17 572	313	333	13 766	10 432	4 150	79 864	122	65	218	277	1 256	3
2004	:	:	3 435	617	18 439	342	331	15 666	:	:	:	132	:	212	263	944	5
Annual average growth rate (%) 2001/2004 1,2,3																	
	3.05	-1.67	-0.02	-0.38	2.05	22.74	-1.08	41.72	6.15	21.44	-8.24	2.38	-6.91	-6.82	-2.30	-3.49	7.72
	NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR
2001	3 651	5 431	6 222	270	466	1 238	496	1 692	32 321	402	:	1 197	94 045	160	:	585	:
2002	3 729	5 971	5 572	273	457	1 216	484	2 043	35 727	399	120	1 151	94 100	159	:	:	:
2003	3 795	6 206	5 569	280	422	1 246	472	2 048	37 604	384	101	1 120	:	210	:	:	:
2004	3 951	6 174	4 833	:	371	1 189	452	2 057	:	389	137	1 098	:	290	:	:	:
Annual average growth rate (%) 2001/2004 1,2,4																	
	2.67	4.37	-8.08	1.84	-7.32	-1.34	-3.05	6.73	7.86	-1.09	6.85	-2.84	0.06	21.92	:	:	:

1) Average annual growth rate 2001/2003 for BE, FR, IE, IT, LV, PT and UK.

2) Average annual growth rate 2002/2004 for EE and LI.

3) Growth rate 2002/2003 for EU-25.

4) Growth rate 2001/2002 for CH.

## 2.2 Enterprise statistics - Number of enterprises

### Travel agencies

	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT
2001	62 231	1 152	6 412 <sup>p</sup>	554	9 106	220	:	6 414	4 479	269	9 592	:	215	259	111	1 633	539
2002	:	:	:	564	9 516	237	:	6 981	4 583	:c	9 821	702	269	261	121	1 624	669
2003	:	:	:	499	8 818	:	:	:	:	:	:	734	:	:	:	:	:
2004	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
Annual average growth rate (%) 2001/2004 1,2																	
	:	:	:	-5.09	-1.59	7.73	:	8.84	2.32	:	2.39	4.56	25.12	0.77	9.01	-0.55	24.12
	NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR
2001	2 370	1 324	:c	942	914	402	811	2 340	6 595	:	:	897	:	845	:	1 111	:
2002	2 340	1 622	:c	970	469	285	847	2 419	6 522	:	:	996	:	928	:	1 225	:
2003	:	1 691	:	:	:	:	:	:	:	:	:	:	:	1 045	:	1 385	:
2004	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
Annual average growth rate (%) 2001/2004 1,2																	
	-1.27	13.01	:	2.97	-48.69	-29.1	4.44	3.38	-1.11	:	:	11.04	:	11.21	:	11.65	:

1) Annual average growth rate 2001/2003 for DK, DE, AT, BG and RO.

2) Growth rate 2001/2002 for EE, ES, FR, IT, LV, LT, LU, HU, MT, NL, PT, SI, SK, FI, SE, UK, NO and 2002/2003 for CY.

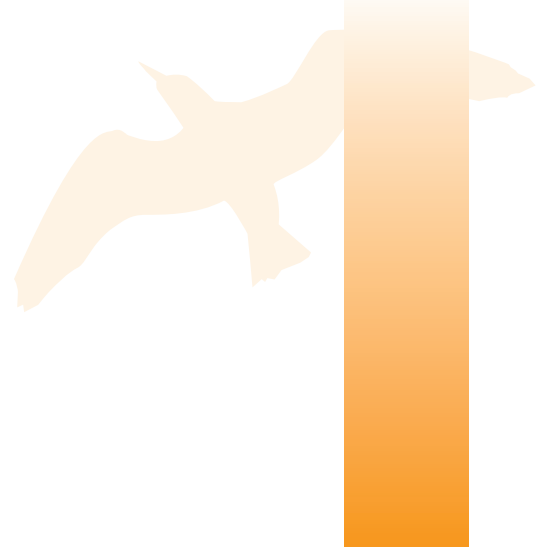
## 2.3 Labour Force Statistics - Employment in hotels and restaurants

Total employment (in 1 000)

	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR1	IE	IT	CY	LV	LT	LU	HU	MT
2001	7 343	128	159	65	1 201	18	277	1 032	799	104	849	28	25	29	9	147	13
2002	7 638	133	172	61	1 233	21	294	1 121	775	104	908	28	22	24	8	143	13
2003	7 554	124	165	63	1 223	18	298	1 145	787	114	900	29	27	31	6	145	12
2004	7 833	128	178	60	1 208	17	280	1 199	813	108	1 040	30	22	32	6	149	12
Annual average growth rate (%) 2001/2004																	
	2.18	0	3.83	-2.63	0.19	-1.89	0.36	5.13	0.58	1.27	7	2.33	-4.17	3.34	-12.64	0.45	-2.63
	NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR
2001	288	206	257	262	34	73	82	123	1 142	6	:	72	135	123	:	127	:
2002	296	196	260	270	36	65	86	114	1 250	6	:	67	145	135	87	113	:
2003	313	216	232	260	36	79	80	122	1 180	6	:	69	145	134	83	118	:
2004	311	212	226	264	38	82	75	131	1 216	5	:	72	149	138	87	138	:
Annual average growth rate (%) 2001/2004 2																	
	2.59	0.96	-4.19	0.25	3.78	3.95	-2.93	2.12	2.11	-5.9	:	0	3.34	3.91	0.00	2.81	:

1) For 2001 and 2002, the first quarter is used.

2) Annual average growth rate 2002/2004 for HR.



## Chapter 3 - Tourism Satellite Accounts

## Tourism satellite accounts

Tourism is a peculiar economic phenomenon in that it arises as a result of the actions/activities of an individual acting in the capacity of a visitor. These activities will create a demand for a wide range of goods and services to be provided by the economic system. The central role of demand makes it difficult to properly locate and quantify tourism in conventional national accounts.

On the demand side of the accounts, tourism consumption is subsumed under "domestic consumer expenditure" and "exports". In the production accounts, tourism production is included in the supply of commodities which are also supplied to satisfy non-tourist demand. This makes it difficult to identify the output attributable to tourism.

The Tourism Satellite Account is a statistical instrument designed to address these and related issues: it is in fact an essential tool for analysing the economic impact of tourism in the economy. It provides a rich and informed view of the tourism industry as a complex sector made up of a large number of firms, especially small and medium-sized enterprises, from a range of conventional industries.

It is an extension of the National Accounts that helps us to understand the size and role of the economic activities involved in tourism, which are usually "hidden" within these accounts.

Its fundamental structure is based on the relationship that exists within the economic system between the demand for goods and services generated by tourism, and the supply of goods and services by the industries. It allows a detailed analysis of all the aspects of demand and supply for goods and services associated with tourism.

A complete TSA can provide:

- a) macro-economic aggregates to measure the size and the economic importance of tourism (e.g. tourism value added and GDP, employment);
- b) detailed information on visitor consumption;
- c) the level of visitor consumption that is satisfied by internal production or by imports;
- d) detailed production accounts for the tourism industries including data on employment, input-output interaction with other productive economic activities, and capital formation;
- e) link between economic data and other non-monetary information on tourism (length of stay, purpose of trip, etc.);
- f) data for the main aggregates at current and constant prices.



The construction of an TSA requires the reconciliation of supply and demand for a range of tourism-related products, including accommodation and food services, transport and travel agents and recreation, and also for other products. Both tourists' expenditure on these commodities and the supply of these goods have to be estimated. Tourism expenditure arises from both international and domestic demand, and also excursions.

The convergence process carried out by Eurostat, the OECD and the WTO in order to establish a common conceptual framework for the development of the methodological design and implementation of a TSA led to the approval of the "Tourism Satellite Account: Recommended Methodological Framework" by the Statistical Commission of the United Nations at its thirty-first session (March 2000).

These recommendations aim to provide a "framework which countries can use for constructing a tourism satellite account and more generally should permit greater international comparability in tourism statistics".

The European Commission, through the work carried out by Eurostat, put considerable effort into formulating these recommendations so as to ensure compatibility with the Community Methodology and the Council Directive (95/57/EC).

As a follow-up to the Council Conclusions of 21 June 1999, the European Commission identified a set of priority actions that should be put into practice in the short-to-medium term in order to develop tourism employment and to reinforce the role of the sector in job creation (June 2001). The implementation of TSAs in Member States has been selected as one of these priorities and the following objectives and benefits have been identified:

- a) to enhance robust information and indicators on the actual and potential role of tourism in the economy, so as to ensure the credibility of the measurements, their consistency with National Accounts, comparability over time within the same economy and among economies, as well as with other fields of economic activities and systematic production;
- b) to bring fresh recognition and confidence to tourism as one of the most important economic sectors of the economy;
- c) to give greater credibility to tourism statistics and in particular to the indicators analysing the scale and the significance of tourism as an economic activity;
- d) to provide a rich and informed view of the "tourism industry" and of its component activities;
- e) to generate usable and practical information for companies particularly SMEs;

- f) to provide a reliable and credible tool necessary for both effective public policies and efficient business operations, as well as for decision-making on a destination-area-regional basis;
- g) to develop research and innovative methodological approaches.

As one of the main basic steps for the implementation of TSA, the purpose of the European Implementation Manual on TSA (EIM) is to give technical and operative guidelines on how to implement all or parts of the accounts, according to country needs and priorities. It is a practical guide written in simple language so as to be easily accessible both to statistical experts and researchers and to professional users who may not be familiar with the construction and use of TSAs. It combines theory with useful instructions and examples for translating theory into practice.

The implementation of the Tourism Satellite Accounts in the EU Member States and Candidate Countries has made rapid progress in recent years thanks to the initiative launched by the European Commission giving financial support to develop feasibility studies and to make a start on the construction of national TSAs.

13 Member States (Austria, Czech Republic, Finland, France, Germany, Italy, Poland, Portugal, Slovenia, Spain, Sweden, The Netherlands, and the United Kingdom) have joined the initiative, and preliminary data comparing the role of tourism in each national economy in terms of expenditure and GDP have been produced. In the near future, more countries will join the initiative and further harmonisation will be needed in order to produce a minimum set of TSA tables from all EU Member States.



## Chapter 4 - Tourism Market

## 4.1 General overview

### Arrivals of residents and non-residents by accommodation establishment (in 1 000)

		EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT	
Hotels and similar establishments	2001	:	7 211	:	2 949	86 646	1 202	12 413	59 904	101 208	:	67 786	2 666	529	:	597	4 817	:	
	2002	:	7 426	7 752	2 978	84 367	1 187	12 119	59 869	101 346	:	67 350	2 410	577	499	621	4 932	:	
	2003	:	7 381	7 947	2 948	84 683	1 315	12 224	62 531	98 885	:	67 330	2 218	659	560	605	4 979	:	
	2004	:	:	8 692	3 115	88 940	1 685	:	66 773p	103 693	:	:	2 171	:	788	637	:	:	
	Annual average growth rate (%), 2001/2004 1, 2																		
		:	1.17	5.89	1.84	0.87	11.92	-0.76	3.68	0.81	:	-0.34	-6.62	11.61	25.66	2.19	1.67	:	
Other accommodation establishments	2001	:	3 596	:	2 183	24 216	:	318	15 037	16 777	:	13 987	10	56	:	281	1 256	:	
	2002	:	3 642	2 663	2 280	24 574	215	273	16 260	16 717	:	14 680	7	89	137	313	1 244	:	
	2003	:	3 691	3 400	2 297	25 754	246	276	17 366	17 137	:	15 395	13	100	157	313	1 336	:	
	2004	:	:	3 527	2 243	27 472	237	:	16 985p	16 611	:	:	16	:	169	292	:	:	
	Annual average growth rate (%), 2001/2004 1, 2																		
		:	1.31	15.08	0.91	4.29	4.99	-6.84	4.14	-0.33	:	4.91	16.96	33.63	11.07	1.29	3.14	:	
Total	2001	:	10 807	:	5 132	110 862	:	12 731	74 941	117 985	:	81 773	2 676	585	:	878	6 073	:	
	2002	:	11 068	10 415	5 258	108 941	1 402	12 392	76 129	118 063	:	82 030	2 417	666	636	934	6 176	:	
	2003	:	11 072	11 347	5 245	110 437	1 561	12 500	79 897	116 022	:	82 725	2 231	759	717	918	6 315	:	
	2004	:	:	12 219	5 358	116 411	1 922	:	83 758p	120 304	:	:	2 187	:	957	929	:	:	
	Annual average growth rate (%), 2001/2004 1, 2																		
		:	1.22	8.31	1.45	1.64	17.09	-0.91	3.78	0.65	:	0.58	-6.51	13.91	22.67	1.90	1.97	:	

1) Annual average growth rate 2001/2003 for BE, EL, IT, LV and HU. 2) Annual average growth rate 2002/2004 for CZ and LT and for EE (Other accommodation and Total).

## 4.1 General overview

### Arrivals of residents and non-residents by accommodation establishment (in 1 000)

		NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR
Hotels and similar establishments	2001	15 046	19 540	6 828	9 392	1 401	2 108	7 216	13 198	71 979	639	58	9 859	13 606	2 070	3 609	:	:
	2002	14 948	19 772	7 116	9 735	1 469	2 350	7 124	12 952	71 856	700	50	9 589	:	2 385	3 876	:	:
	2003	14 310	20 185	7 535	9 619	1 515	2 277	7 215	12 911	66 417	763	50	9 437	:	2 806	4 015	:	:
	2004	15 517	20 673	9 658p	:	1 592	:	7 567	13 119	:	819	50	9 876	:	3 171	:	:	:
	Annual average growth rate (%), 2001/2004 1		1.03	1.90	12.25	1.20	4.35	3.93	1.60	-0.20	-3.94	8.62	-4.83	0.06	:	15.28	5.47	:
Other accommodation establishments	2001	10 140	3 981	7 402	1 515	619	1 040	1 274	5 454	14 896	403	18	4 954	86	162	2 857	:	:
	2002	10 216	4 164	7 058	1 644	621	1 073	1 307	6 270	16 968	391	17	5 004	:	137	2 899	:	:
	2003	10 632	4 149	7 109	1 664	653	1 067	1 279	6 751	15 782	404	18	:	:	166	3 167	:	:
	2004	10 156	4 090	6 088p	:	675	:	1 374	7 687	:	429	18	:	:	176	:	:	:
	Annual average growth rate (%), 2001/2004 1, 2		0.05	0.90	-6.31	4.80	2.93	1.29	2.55	12.12	2.93	2.11	0.00	1.01	:	2.80	5.29	:
Total	2001	25 186	23 521	14 230	10 907	2 020	3 148	8 490	18 652	86 875	1 042	76	14 813	13 692	2 232	6 466	:	:
	2002	25 164	23 936	14 174	11 379	2 090	3 423	8 431	19 222	88 824	1 091	67	14 593	:	2 522	6 775	:	:
	2003	24 942	24 334	14 644	11 283	2 168	3 344	8 494	19 662	82 199	1 167	68	:	:	2 972	7 182	:	:
	2004	25 673	24 763	15 746p	:	2 267	:	8 941	20 806	:	1 248	68	:	:	3 347	:	:	:
	Annual average growth rate (%), 2001/2004 1, 2		0.64	1.73	3.43	1.71	3.92	3.07	1.74	3.71	-2.73	6.20	-3.64	-1.49	:	14.46	5.39	:

1) Annual average growth rate 2001/2003 for PT, SK, UK and HR. 2) Growth rate 2001/2002 for NO.

## 4.1 General overview

### Nights of residents and non-residents by accommodation establishment (in 1 000)

		EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT
Hotels and similar establishments	2001	1 049 769	14 069	22 162	9 140	197 073	1 913	56 586	228 682	191 228	25 267	238 882	18 793	1 474	965	1 246	13 726	7 475
	2002	1 026 047	14 500	23 803	9 227	189 970	2 337	53 478	222 555	192 056	24 716	231 132	16 103	1 527	1 050	1 244	13 834	8 387
	2003	:	14 341	23 467	9 138	189 541	2 644	53 476	228 161	184 859	:	229 151	14 381	1 632	1 108	1 224	13 870	8 122
	2004	:	:	24 931	9 672	195 047	3 292	:	234 919p	188 524	:	:	14 623	:	1 642	1 279	:	8 157
			Annual average growth rate (%), 2001/2004 1,2															
		:	0.96	4.00	1.90	-0.34	19.83	-2.79	0.90	-0.47	-2.18	-2.06	-8.02	5.22	19.38	0.88	0.52	2.95
Other accommodation establishments	2001	:	14 625	15 558	16 056	101 872	:	1 162	116 247	98 072	5 283	111 441	33	141	539	1 365	4 922	:
	2002	:	14 592	13 307	16 458	101 515	359	988	116 315	97 484	6 894	114 115	56	166	606	1 426	4 616	:
	2003	:	14 677	15 876	17 210	103 424	441	1 026	114 380	98 238	:	115 262	77	175	552	1 512	4 741	:
	2004	:	:	15 849	16 478	143 722	465	:	110 130p	94 493	:	:	94	:	526	1 415	:	:
			Annual average growth rate (%), 2001/2004 1,2,3															
		:	0.18	0.62	0.87	12.16	13.81	-6.03	-1.79	-1.23	30.49	1.70	41.75	11.41	-0.81	1.21	-1.86	:
Total	2001	:	28 694	37 720	25 196	298 945	:	57 748	344 929	289 300	30 550	350 323	18 826	1 615	1 504	2 611	18 648	:
	2002	:	29 092	37 110	25 685	291 485	2 696	54 466	338 870	289 540	31 610	345 247	16 159	1 693	1 656	2 670	18 450	:
	2003	:	29 018	39 343	26 348	292 965	3 085	54 502	342 541	283 097	:	344 413	14 458	1 807	1 660	2 736	18 611	:
	2004	:	:	40 780	26 150	338 769	3 757	:	345 049p	283 017	:	:	14 717	:	2 168	2 694	:	:
			Annual average growth rate (%), 2001/2004 1,2,3															
		:	0.56	2.63	1.25	4.26	18.05	-2.85	0.01	-0.73	3.47	-0.85	-7.88	5.78	12.96	1.05	-0.10	:

1) Annual average growth rate 2001/2003 for BE, EL, IT, LV and HU. 2) Growth rate 2001/2002 for IE. 3) Annual average growth rate 2002/2004 for other accommodation and total for EE.

## 4.1 General overview

### Nights of residents and non-residents by accommodation establishment (in 1 000)

		NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR	
Hotels and similar establishments	2001	28 563	72 554	13 215	33 563	4 594	6 054	13 557	21 664	184 201	1 181	123	16 416	33 586	8 978	19 131	16 372	50 455	
	2002	28 515	73 523	13 381	34 209	4 763	7 526	13 273	21 011	178 937	1 261	108	16 188	:	9 980	19 597	17 277	:	
	2003	27 182	73 868	14 263	33 875	4 891	7 356	13 429	21 068	167 483	1 369	107	15 636	:	12 045	19 669	17 845	:	
	2004	28 386	74 007	18 448p	:	4 965	:	13 812	21 526	:	1 469	104	16 360	:	13 562	:	:	:	
	Annual average growth rate (%), 2001/2004 1																		
		-0.21	0.66	11.76	0.46	2.62	10.23	0.62	-0.21	-4.65	7.55	-5.44	-0.11	:	14.74	1.40	4.40	:	
Other accommodation establishments	2001	51 912	21 785	32 731	7 777	2 264	5 214	2 655	19 531	81 640	562	60	7 917	34 730	407	14 786	1 750	:	
	2002	53 857	22 331	30 831	7 602	2 265	4 690	2 720	21 885	84 832	600	58	8 058	:	305	14 752	:	:	
	2003	54 024	21 372	31 084	7 708	2 308	4 583	2 653	22 986	80 421	616	59	8 172	:	477	15 578	:	:	
	2004	52 527	21 243	28 209p	:	2 336	:	2 887	21 140	:	665	57	8 914	:	598	:	:	:	
	Annual average growth rate (%), 2001/2004 1																		
		0.39	-0.84	-4.84	-0.44	1.05	-6.25	2.83	2.67	-0.75	5.77	-1.70	4.03	:	13.68	2.64	:	:	
Total	2001	80 475	94 339	45 946	41 340	6 858	11 268	16 212	41 195	265 841	1 743	183	24 333	68 316	9 385	33 917	18 122	:	
	2002	82 372	95 854	44 212	41 811	7 028	12 216	15 993	42 896	263 769	1 861	166	24 246	:	10 285	34 349	:	:	
	2003	81 206	95 240	45 347	41 583	7 199	11 939	16 082	44 054	247 904	1 985	166	23 808	:	12 522	35 247	:	:	
	2004	80 913	95 250	46 657p	:	7 301	:	16 699	42 666	:	2 134	161	25 274	:	14 160	:	:	:	
	Annual average growth rate (%), 2001/2004 1																		
		0.18	0.32	0.51	0.29	2.11	2.93	0.99	1.18	-3.43	6.98	-4.18	1.27	:	14.69	1.94	:	:	

1) Annual average growth rate 2001/2003 for PT, SK, UK and HR.

## 4.1 General overview

### Arrivals of non-residents by accommodation establishment (in 1 000)

		EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT	
Hotels and similar establishments	2001	:	5 117	:	1 310	15 754	896	6 946	27 012	35 097	3 577	29 138	2 335	319	:	577	2 669	:	
	2002	:	5 323	4 314	1 284	15 672	937	6 654	26 611	36 093	:	29 340	2 034	352	343	599	2 659	:	
	2003	:	5 261	4 485	1 294	15 979	1 009	6 574	27 249	32 520	:	28 174	1 818	402	385	581	2 599	:	
	2004	:	:	5 346	1 363	17 620	1 300	:	27 630	33 988	:	:	1 725	:	530	613	:	:	
	Annual average growth rate (%), 2001/2004 1,2																		
		:	1.40	11.32	1.33	3.80	13.21	-2.71	0.76	-1.06	:	-1.67	-9.60	12.26	24.31	2.04	-1.32	:	
Other accommodation establishments	2001	:	1 334	:	719	2 191	:	211	9 241	6 855	462	6 630	4	4	:	256	401	:	
	2002	:	1 401	429	726	2 221	67	189	9 427	7 092	:	7 015	6	9	24	283	354	:	
	2003	:	1 429	591	721	2 403	104	194	9 395	6 835	:	6 832	8	13	26	283	349	:	
	2004	:	:	715	657	2 517	74	:	8 729	6 749	:	:	10	:	28	259	:	:	
	Annual average growth rate (%), 2001/2004 1,2																		
		:	3.50	29.1	-2.96	4.73	5.09	-4.11	-1.88	-0.52	:	1.51	35.72	80.28	8.01	0.39	-6.71	:	
Total	2001	:	6 451	:	2 029	17 945	:	7 157	36 253	41 952	4 039	35 768	2 339	323	:	833	3 070	:	
	2002	:	6 724	4 743	2 010	17 893	1 004	6 843	36 038	43 185	:	36 355	2 040	361	367	882	3 013	:	
	2003	:	6 690	5 076	2 015	18 382	1 113	6 768	36 644	39 355	:	35 006	1 826	415	411	864	2 948	:	
	2004	:	:	6 061	2 020	20 137	1 374	:	36 359	40 737	:	:	1 735	:	558	872	:	:	
	Annual average growth rate (%), 2001/2004 1,2																		
		:	1.84	13.04	-0.15	3.92	16.98	-2.76	0.10	-0.97	:	-1.07	-9.48	13.35	23.31	1.54	-2.01	:	

1) Annual average growth rate 2001/2003 for BE, EL, IT, LV and HU. 2) Annual average growth rate 2002/2004 for CZ and LT and for EE (Other accommodation and Total).



## 4.1 General overview

### Arrivals of non-residents by accommodation establishment (in 1 000)

		NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR
Hotels and similar establishments	2001	7 445	13 279	2 488	4 934	933	927	1 774	2 586	17 019	465	56	2 686	7 455	864	2 795	:	:
	2002	7 433	13 487	2 536	5 060	1 006	1 041	1 796	2 577	14 176	513	49	2 561	:	1 030	2 989	:	:
	2003	6 931	13 748	2 701	4 906	1 053	1 043	1 800	2 552	14 397	569	49	2 439	:	1 376	3 087	:	:
	2004	7 602	14 075	3 385	:	1 125	:	1 825	2 610	:	615	49	2 556	:	1 668	:	:	:
	Annual average growth rate (%), 2001/2004 1		0.70	1.96	10.81	-0.28	6.44	6.07	0.95	0.31	-8.03	9.77	-4.35	-1.64	:	24.52	5.09	:
Other accommodation establishments	2001	2 055	2 156	663	458	243	286	225	1 522	1 986	207	15	1 557	13	10	2 485	:	:
	2002	2 163	2 309	610	500	250	344	246	1 699	1 488	192	15	1 573	:	10	2 546	:	:
	2003	2 250	2 535	631	477	272	326	248	1 716	1 482	202	15	:	:	22	2 784	:	:
	2004	2 045	2 558	549	:	325	:	268	2 066	:	221	15	:	:	26	:	:	:
	Annual average growth rate (%), 2001/2004 1,2		-0.16	5.86	-6.1	2.05	10.18	6.76	6.00	10.72	-13.62	2.21	0.00	1.03	:	37.51	5.85	:
Total	2001	9 500	15 435	3 151	5 392	1 176	1 213	1 999	4 108	19 005	672	71	4 243	7 468	874	5 280	:	:
	2002	9 596	15 796	3 146	5 560	1 256	1 385	2 042	4 276	15 664	705	64	4 134	:	1 040	5 535	:	:
	2003	9 181	16 283	3 332	5 383	1 325	1 369	2 048	4 268	15 879	771	64	:	:	1 398	5 871	:	:
	2004	9 647	16 633	3 934	:	1 450	:	2 093	4 676	:	836	64	:	:	1 694	:	:	:
	Annual average growth rate (%), 2001/2004 1,2		0.51	2.52	7.68	-0.08	7.23	6.24	1.54	4.41	-8.59	7.55	-3.40	-2.57	:	24.68	5.45	:

1) Annual average growth rate 2001/2003 for PT, SK, UK and HR. 2) Growth rate 2001/2002 for NO.

## 4.1 General overview

### Nights of non-residents by accommodation establishment (in 1 000)

		EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT1	
Hotels and similar establishments	2001	641 361	10 011	13 647	4 551	32 876	1 423	43 454	143 421	75 652	17 475	100 322	18 066	837	672	1 174	8 405	7 475	
	2002	628 492	10 410	13 327	4 483	32 580	1 887	40 350	135 836	77 602	17 321	97 837	15 235	853	719	1 167	8 260	8 387	
	2003	:	10 281	13 688	4 507	33 301	2 086	39 760	136 865	69 323	:	93 935	13 424	963	766	1 144	8 046	8 122	
	2004	:	:	15 881	4 767	36 631	2 602	:	135 041	70 391	:	:	13 554	:	1 131	1 194	:	8 157	
	Annual average growth rate (%), 2001/2004 2,3																		
		:	1.34	5.18	1.56	3.67	22.28	-4.34	-1.99	-2.37	-0.88	-3.24	-9.13	7.26	18.95	0.56	-2.16	2.95	
Other accommodation establishments	2001	:	5 362	2 917	5 197	7 753	:	678	88 022	34 609	2 783	46 350	23	10	63	1 223	2 489	1 835	
	2002	250 386	5 494	2 242	5 099	7 809	111	603	84 863	35 639	2 636	47 723	54	19	80	1 279	2 101	2 119	
	2003	:	5 649	2 823	5 352	8 276	182	648	80 986	34 421	:	45 719	66	20	69	1 373	1 994	2 994	
	2004	:	:	3 100	4 806	8 742	145	:	74 890	33 787	:	:	82	:	66	1 273	:	2 817	
	Annual average growth rate (%), 2001/2004 2,3,4																		
		:	2.64	2.05	-2.57	4.08	14.29	-2.24	-5.24	-0.80	-5.28	-0.68	52.77	41.42	1.56	1.34	-10.49	15.36	
Total	2001	:	15 373	16 564	9 748	40 629	:	44 132	231 443	110 261	20 258	146 672	18 089	847	735	2 397	10 894	9 310	
	2002	878 878	15 904	15 569	9 582	40 389	1 998	40 953	220 699	113 241	19 957	145 560	15 289	872	799	2 446	10 361	10 506	
	2003	:	15 930	16 511	9 859	41 577	2 268	40 408	217 851	103 744	:	139 654	13 490	983	835	2 517	10 040	11 116	
	2004	:	:	18 981	9 573	45 374	2 747	:	209 931	104 178	:	:	13 636	:	1 197	2 467	:	10 974	
	Annual average growth rate (%), 2001/2004 2,3,4																		
		:	1.80	4.64	-0.60	3.75	17.26	-4.31	-3.20	-1.87	-1.49	-2.42	-8.99	7.73	17.65	0.96	-4.00	5.63	

1) Includes data on residents. 2) Annual average growth rate 2001/2003 for BE, EL, IT, LV and HU. 3) Growth rate 2001/2002 for IE. 4) Annual average growth rate 2002/2004 for EE.

## 4.1 General overview

### Nights of non-residents by accommodation establishment (in 1 000)

		NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR
Hotels and similar establishments	2001	14 955	54 086	4 918	23 578	2 879	3 101	3 675	4 927	49 781	907	120	4 817	19 273	6 122	16 500	2 301	36 307
	2002	14 922	55 167	4 999	23 563	3 049	3 572	3 721	4 868	48 377	970	106	4 706	:	6 989	16 906	:	43 225
	2003	13 798	55 200	5 450	23 215	3 166	3 560	3 758	4 833	49 003	1 070	105	4 375	:	8 987	16 830	:	:
	2004	14 618	55 160	6 876	:	3 258	:	3 769	5 061	:	1 146	101	4 596	:	10 139	:	:	:
	Annual average growth rate (%), 2001/2004 1,2		-0.76	0.66	11.82	-0.77	4.21	7.15	0.85	0.90	-0.78	8.11	-5.58	-1.55	:	18.31	1.00	:
Other accommodation establishments	2001	10 547	11 437	2 072	1 651	761	1 246	508	4 207	20 000s	277	44	2 505	12 838	68	13 259	90	:
	2002	11 446	12 179	2 086	1 556	783	1 413	570	4 900	17 582	286	46	2 570	:	67	13 381	:	:
	2003	11 543	13 017	2 378	1 655	830	1 324	573	4 882	18 131	307	45	2 581	:	156	14 153	:	:
	2004	10 768	13 110	2 437	:	930	:	637	4 663	:	333	44	2 846	:	164	:	:	:
	Annual average growth rate (%), 2001/2004 1		0.69	4.66	5.56	0.12	6.91	3.08	7.83	3.49	-4.79	6.33	0.00	4.35	:	34.11	3.32	:
Total	2001	25 502	65 523	6 990	25 229	3 640	4 347	4 183	9 134	69 781	1 184	164	7 322	32 111	6 190	29 759	2391	:
	2002	26 368	67 346	7 085	25 119	3 832	4 985	4 291	9 768	65 959	1 256	152	7 276	:	7 056	30 287	:	:
	2003	25 341	68 217	7 828	24 870	3 996	4 884	4 331	9 715	67 134	1 377	150	6 956	:	9 143	30 983	:	:
	2004	25 386	68 270	9 313	:	4 188	:	4 406	9 724	:	1 479	145	7 442	:	10 303	:	:	:
	Annual average growth rate (%), 2001/2004 1		-0.15	1.38	10.04	-0.71	4.79	6.00	1.75	2.11	-1.91	7.70	-4.02	0.54	:	18.51	2.04	:

1) Annual average growth rate 2001/2003 for PT, SK, UK and HR. 2) Growth rate 2001/2002 for TR.

## 4.2 Domestic tourism

Number of 4+ nights holiday trips by resident tourists in the country (in 1 000)

	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT	
2001	:	1 158	:	1 428	35 368	:	4 023	26 636	64 702	1 057	26 705	:	:	:	2	:	:	
2002	:	1 234	:	1 663	41 702	167	3 944	20 812	67 414	703	28 549	:	:	:	5	:	:	
2003	:	1 444	5 884	1 927	47 994	116	:	20 580	66 705	1 069	27 538	:	219	:	3	:	:	
2004	:	1 478	5 552	:	37 388	125	:	20 942	67 216	:	27 905p	:	:	360	:	3 969	:	
Annual average growth rate (%), 2001/2004 1,2,3																		
	:	8.47	-5.64	16.17	1.87	-13.48	-1.96	-7.70	1.28	0.57	1.48	:	:	:	22.47	:	:	
	NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR	
2001	6 118	1 896	:	3 541	:	:	4 116	:	37 400	:	:	2 698	:	:	:	:	:	
2002	7 046	1 664	:	3 508	:	:	4 298	:	37 100	:	:	2 777	:	:	:	:	:	
2003	6 996	2 960	15 140	2 959	418	2 841	4 441	:	33 600	:	:	3 066	:	:	:	:	:	
2004	6 956	2 769	13 613e	3 225	414	2 554	4 308	4 622	:	:	:	2 877	:	:	:	:	:	
Annual average growth rate (%), 2001/2004 1,2																		
	4.37	13.46	-10.09	-3.07	-0.96	-10.10	1.53	:	-5.22	:	:	2.16	:	:	:	:	:	

1) Annual average growth rate 2001/2003 for DK, IE, LU and UK.

2) Growth rate 2003/2004 for CZ, PL, SI, SK and 2001/2002 for EL.

3) Annual average growth rate 2002/2004 for EE.

## 4.3 Outbound tourism

Number of 4+ nights holiday trips by resident tourists abroad (in 1 000)

	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT
2001	:	4 539	:	2 956	72 030	:	449	2 638	12 156	2 161	8 402	:	:	:	562	:	:
2002	:	4 475	:	3 034	67 717	146	420	2 389	12 546	1 980	8 531	412	:	:	665	:	:
2003	:	5 136	4 457	3 269	68 024	149	:	2 493	12 493	2 626	8 496	407	305	:	634	:	:
2004	:	5 505	4 031	:	66 559	122	:	2 820	13 856	:	9 232p	470	270	567	:	1 481	:
Annual average growth rate (%), 2001/2004 1,2,3																	
	:	6.64	-9.56	5.16	-2.60	-8.59	-6.46	2.25	4.46	10.24	3.19	6.81	-11.48	:	6.21	:	:
	NL	AT	PL	PT	SI	SK	FI	SE	UK	IS	LI	NO	CH	BG	HR	RO	TR
2001	9 951	3 500	:	663	:	:	1 710	:	41 900	:	:	2 348	:	779	:	:	:
2002	10 981	3 270	:	787	:	:	1 632	:	40 600	:	:	2 629	:	835	:	:	:
2003	11 032	5 062	3 840	608	1 108	1 965	1 610	:	39 900	:	:	2 588	:	903	:	:	:
2004	11 519	5 072	3 026e	940	1 121	1 955	1 892	4 185	:	:	:	2 916	:	1 074	:	:	:
Annual average growth rate (%), 2001/2004 1,2																	
	5.00	13.16	-21.2	12.34	1.17	-0.51	3.43	:	-2.42	:	:	7.49	:	11.30	:	:	:

1) Annual average growth rate 2001/2003 for DK, IE, LU and UK.

2) Growth rate 2003/2004 for CZ, LV, PL, SI, SK and 2001/2002 for EL.

3) Annual average growth rate 2002/2004 for EE and CY.



## Chapter 5 - Country Profiles

## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident <sup>1</sup>	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>		total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total	%	Mio. €	Mio. €
10 396	30 518	340.7	2.8	283 752	27.3	:	4 144	3.1	1.9	11 060	7 379

1) 2003 data.

## 5.2 Recent trends

Belgium is basically a country of origin for international tourism. Figures on accommodation supply showed a slight decrease in the number of hotels and similar establishments between 2001 and 2003 (-1.9% on average each year). In the same period, the number of bed places was more or less stable (+0.3% annual average growth rate). This resulted in an increase of the average size of establishments from 60 bed places in 2001 to 63 in 2003.

Domestic demand showed a slight decrease in 2003 compared to 2002 (-0.8% in terms of nights), following a similar decline between 2001 and 2002 (-1%). On the other hand, nights spent by non-residents were almost stable in 2003 compared with 2002 (15.93 and 15.90 million respectively), after growing by 3.4% between 2001 and 2002. Their share of total nights rose from 53.6% in 2001 to 54.9% in 2003.

The United Kingdom, the Netherlands and France were the top markets of origin, accounting for 51.4% of total international tourist nights (52.7% in 2001). Considering total tourism in the country (domestic + inbound), the ratio of tourists/resident in 2003 was 2.8.

Regarding holidays of 4 nights and more, outbound tourism expanded after 2001. Despite a small fall of 1.4% between 2001 and 2002, there was an upturn in trips from 4 505 000 to 5 505 000 in the period from 2001 to 2004. This represents an annual average growth rate of 10.1%. In 2004, trips abroad accounted for about 78.8% of total trips compared to 79.7% in 2001. France, Spain and Italy were the main destinations of Belgian tourists (55% of total trips abroad in 2003 against 58% in 2001). Comparing tourism expenditures and receipts, tourism posted a negative balance of EUR 3 681 million in 2004.

### 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	2 034	2 010	1 957	:
Number of bed places	121 512	123 356	122 385	:

### 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin						Monthly distribution of nights spent in collective accommodation, in 1 000			
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000										
2001	13 321	15 373	UK	23.8	NL	16.6	FR	12.3	July	2 633	July	1 994
2002	13 189	15 903	UK	22.9	NL	16.0	FR	12.7	July	2 661	August	2 096
2003	13 089	15 930	UK	22.0	NL	16.2	FR	13.2	July	2 587	July	2 141
2004	:	:	:	:	:	:	:	:	:	:	:	:
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination						Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000			
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
2001	4 539	79.7	FR	33.6	ES	16.5	IT	7.9	July	344	July	1 123
2002	4 475	78.4	FR	32.7	ES	16.6	IT	8.3	July	314	July	1 129
2003	5 136	78.1	FR	30.9	ES	16.3	IT	7.8	July	347	July	1 320
2004	5 505	78.8	:	:	:	:	:	:	July	423	July	1 391



## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>		total Mio. ₺	per head 1 000 ₺	tourism as % of total	total in 1 000	tourism as % of total	%	Mio. ₺	Mio. ₺
10 211	78 860	129.5	4.0	86 239	8.4	:	4 682	3.8	2.6	1 835	3 366

## 5.2 Recent trends

The Czech Republic is an emerging destination for international tourism in Europe. Data on accommodation supply showed both ups and downs. Compared to the previous year, the figures for 2004 showed a slight increase in the number of establishments (+0.7%) and a bigger increase in bed places (+3%). However, there was a sharp decrease between 2002 and 2003 (-14.0% and -8.4% respectively) and a boom from 2001 to 2002 (+42.2% and +20.6% respectively). The average number of bed places per establishment in 2004 was 53 (57 in 2001).

Domestic demand declined in 2004 (-4.5% in terms of nights), after growing in the previous years (+1.8% in 2002, +6.0% in 2003). Conversely, nights spent by non-residents continued to increase (+15.0% in 2004, +6.5% in 2003), making up the decline between 2001 and 2002 (-6.0%). Their share of total nights spent in collective accommodation rose from 43.9% in 2001 to 46.5% in 2004.

In 2004, Germany, the United Kingdom and Italy were the top markets of origin, accounting for about 47% of total international tourist flows (48.5% in 2002). Considering total tourism in the country (domestic + inbound), the tourists/resident ratio in 2004 was 4.0.

Looking at holidays of 4 nights and more, outbound tourism fell by -9.5% in 2004 (from 4 457 000 in 2003 to 4 031 000 trips), accounting for about 42.1% of total trips made by residents (43.1% in 2003). Slovakia, Italy and Austria were the main destinations of Czech tourists (30% of total trips abroad in 2004), with Austria passing Greece in 2004.

Comparing tourism expenditures and receipts, tourism showed a positive balance of EUR 1 531 million in 2004.

## 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	3 576	5 087	4 374	4 404
Number of bed places	203 972	245 957	225 288	232 058

## 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin					Monthly distribution of nights spent in collective accommodation, in 1 000				
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000										
2001	21 156	16 564	:	:	:	:	:	:	:	:	:	:
2002	21 541	15 569	DE	36.9	UK	6.2	IT	5.4	July	3 258	July	1 944
2003	22 833	16 511	DE	32.9	UK	8.1	IT	5.7	July	3 961	July	1 999
2004	21 800	18 981	DE	29.3	UK	11.0	IT	6.8	July	3 960	July	2 249
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination					Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000				
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
2001	:	:	:	:	:	:	:	:	:	:	:	:
2002	:	:	:	:	:	:	:	:	:	:	:	:
2003	4 457	43.1	SK	18.4	IT	11.6	EL	7.1	July	1 567	August	1 158
2004	4 031	42.1	SK	12.4	IT	10.8	AT	6.8	August	1 527	August	978

## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>		total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total	%	Mio. €	Mio. €
5 398	43 094	125.3	4.9	194 421	36.0	:	2 742	2.2	0.9	5 871	4 574

## 5.2 Recent trends

Denmark is more a generator of outbound tourism than an international tourism destination. Accommodation supply displayed a varied trend in the first years of the 21st century. 2004 figures highlighted growth in the number of establishments (+1.9% in comparison to 2003), which compensated for the decline in 2003 (-1.3% compared to 2002). On the other hand, bed places recorded a steady expansion between 2001 and 2004 (+2.4% in 2002, +2.0% in 2003, and +3.1% in 2004). This meant an increase in the average size of establishments from 135 beds in 2001 to 144 in 2004.

Domestic demand rose slightly between 2001 and 2004. In 2004, nights spent by residents accounted for 63.4% of total nights, which was a slight increase compared to 2003 (+0.5%) following a period of stronger growth (+2.4% between 2002 and 2003, +4.2% between 2001 and 2002).

On the other hand, nights spent by non-residents showed an up-and-down trend in the first years of the 21st century (-2.9% in 2004, +2.9% in 2003 and -1.7% in 2002). Sweden, Norway and the United Kingdom were the top markets of origin, accounting for more than half of all international tourist nights in 2004. Considering total tourism in the country (domestic + inbound), the ratio of tourists/resident in 2004 was 4.9. For holidays of 4 nights and more, outbound tourism grew by 7.7% from 2002 to 2003, following the positive trend of the previous years. In 2003, holiday trips abroad accounted for about 63% of total trips made by residents (67.4% in 2001). Spain, France and Sweden were the main destinations of Danish tourists (33.0% of total trips 2003 against 34.7% in 2001).

Comparing tourism expenditures and receipts, tourism showed a negative balance of EUR 1 297 million in 2004.

## 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	475	477	471	480
Number of bed places	63 994	65 514	66 848	68 896

## 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin						Monthly distribution of nights spent in collective accommodation, in 1 000			
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000							July		July	
2001	15 449	9 748	SE	22.9	NO	16.4	UK	10.9	July	4 083	July	2 686
2002	16 103	9 582	SE	22.1	NO	18.7	UK	10.5	July	4 254	July	2 650
2003	16 489	9 859	SE	22.5	NO	19.9	UK	9.8	July	4 421	July	2 627
2004	16 578	9 573	SE	21.4	NO	18.7	UK	11.0	July	4 323	July	2 503
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination						Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000			
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
									July		July	
2001	2 956	67.4	ES	13.1	FR	13.1	EL	8.5	July	539	July	660
2002	3 034	64.6	ES	13.5	FR	12.9	SE	8.1	July	568	July	626
2003	3 269	62.9	ES	12.2	FR	11.4	SE	9.4	July	758	July	724
2004	:	:	:	:	:	:	:	:	:	:	:	:

## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
				total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total			
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>							%	Mio. €	Mio. €
82 532	357 020	231.2	4.1	2 215 650	26.8	:	35 463	3.4	1.8	58 058	22 234

## 5.2 Recent trends

Germany is one of the main generators of international tourism at world level. The trend in accommodation supply between 2001 and 2004 showed a decrease of 43% in the number of establishments and an almost stable number of bed places in the same period (+0.4%), which resulted in a small increase in the average size per establishment (42 bed places in 2001, 44 in 2004). Domestic demand increased substantially from 2001 to 2004 (+13.6%). In 2004, nights spent by residents accounted for about 87% of total nights - a sharp rise compared to 2003 after a fairly stable situation between 2002 and 2003 and a decrease between 2001 and 2002 (-2.8%). Likewise, nights spent by non-residents rose by 9.1% in 2004, after a small drop in 2002 (-0.6%) and a rise in 2003 (+ 2.9%). The United States, the Netherlands and the United Kingdom were the top markets of origin, accounting for 31.0% of total international tourist nights in 2004.

Considering total tourism in the country (domestic + inbound), the tourists/resident ratio in 2004 was 4.1. Looking at outbound tourism, holiday trips abroad of 4 nights and more declined during the first years of the 21st century. They fell by 2.2% from 2003 to 2004, after stabilising between 2002 and 2003 (+0.5%), following a 6.0% slump between 2001 and 2002 as a consequence of the events of 11 September. In 2004, outbound trips represented about 64% of total trips made by residents (67.1% in 2001). Spain, Italy and Austria were the main destinations of German tourists in 2004 (43.5% of total trips abroad in 2004 against 47.1% in 2001), with Spain passing Italy.

Comparing tourism expenditures and receipts, tourism accounted for a negative balance of EUR 35 824 million in 2004.

## 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	38 529	38 129	37 547	36 884
Number of bed places	1 602 960	1 607 700	1 611 106	1 609 027

## 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin						Monthly distribution of nights spent in collective accommodation, in 1 000			
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000										
2001	258 315	40 629	US	12.1	NL	10.4	UK	10.2	August	33 610	July	5 528
2002	251 097	40 389	US	11.6	NL	10.6	UK	9.8	August	32 453	July	5 406
2003	251 388	41 577	NL	11.0	US	10.6	UK	9.4	August	35 181	July	5 597
2004	293 395	45 374	US	11.1	NL	10.6	UK	9.3	August	37 692	July	5 866
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination						Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000			
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
2001	72 030	67.1	ES	18.9	IT	14.6	AT	13.6	August	4 897	August	9 705
2002	67 717	61.9	IT	17.0	ES	16.3	AT	14.6	August	6 304	October	9 022
2003	68 024	58.6	IT	16.1	ES	16.0	AT	15.6	August	7 131	August	11 089
2004	66 559	64.0	ES	15.2	IT	14.3	AT	14.0	August	6 164	August	10 556

## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>		total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total	%	Mio. €	Mio. €
1 351	45 228	29.9	2.8	9 043	6.7	:	595	2.9	3.0	311	704

## 5.2 Recent trends

Estonia, one of the new Member States, is an emerging origin/destination on the European tourism market. Figures for 2004 showed an increase in hotel accommodation supply compared to the previous year (establishments +16.1%, bed places +23.5%), which strengthened the growth already recorded in 2003 (+19.2% and +15.5%). This represents a rise in the average size per establishment from 82 to 85 bed places between 2002 and 2004.

Domestic demand in terms of nights is expanding steadily: up 23.7% in 2004 (from 817 thousand to 1 million), after recording a rise of 17.0% in 2003. Nights spent by non-residents also rose sharply in the same years (+21.1% in 2004 and +13.5% in 2003). Finland, Sweden and Germany were the top markets of origin, accounting for about 75% of total international tourist nights.

Finland alone generated more than 60% of total foreign nights. Considering total tourism in the country (domestic + inbound), the ratio of tourists/resident in 2004 was 2.8.

Looking at outbound tourism, numbers of holiday trips abroad of 4 nights and more are still low compared to domestic trips and slumped in 2004 (after falling 18.1%, from 149 000 to 122 000 in 2003) They accounted for about 50% of total trips made by residents in 2004 compared to 46.6% in 2002.

Comparing tourism expenditures and receipts, tourism presented a positive balance of EUR 393 million in 2004.

### 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	353	193	230	267
Number of bed places	17 385	15 895	18 366	22 673

### 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin					Monthly distribution of nights spent in collective accommodation, in 1 000				
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000										
2001	:	:	:	:	:	:	:	:	:	:	:	:
2002	698	1 998	FI	59.3	SE	6.2	DE	5.8	:	:	:	:
2003	817	2 268	FI	64.1	SE	6.0	DE	5.2	July	113	July	320
2004	1 011	2 747	FI	62.3	SE	6.8	DE	5.7	July	157p	July	433p
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination					Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000				
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
2001	:	:	:	:	:	:	:	:	:	:	:	:
2002	146	46.6	:	:	:	:	:	:	August	49	July	42
2003	149	56.2	:	:	:	:	:	:	July	41e	August	30e
2004	122	49.6	:	:	:	:	:	:	July	31	:	:



## 5.1 People and the economy in 2004

Population 1	Surface	Population density	Tourists/ resident 1	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>		total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total	%	Mio. €	Mio. €
11 041	131 626	83.9	5.0	165 281	15.0	:	4 331	6.5	3.0	2 311	10 348

1) 2003 data.

## 5.2 Recent trends

Greece is one of the most popular tourism destinations in Europe. The hotel accommodation supply has shown steady growth since 2002. In 2004, the year of the Olympic Games, the number of establishments rose by +2.4% and bed places increased by +3.6% compared to 2003 (+4.3% and +6.4% respectively in 2003 compared to 2002). This meant an increase in the average size of establishments from 73 bed places in 2001 to 75 in 2004.

Regarding domestic demand, in 2003 Greece recorded an increase of 4.3% in terms of nights (from 13.5 millions to 14.1 million), after a small decrease of 0.7% in 2002, representing about 26% of total tourist nights spent in the country (23.6% in 2001). On the other hand, nights spent by non-residents decreased in both 2003 and 2002 (-1.3% and -7.2% respectively). Germany, the United Kingdom and France were the top markets of origin, accounting for more than 52% of total

international tourist nights, with France passing Italy in 2002. Considering total tourism in the country (domestic + inbound), the ratio of tourists/resident in 2003 was 5.0.

Considering outbound tourism, in 2002 holiday trips of 4 nights and more by Greek tourists abroad decreased by 6.4% compared to 2001. They accounted for only 9.6% of total trips made by residents in 2002 (10.0% in 2001). Italy, Germany and France were the main destinations of Greek tourists (26.5% of total trips abroad). In 2001, Germany was ranked first, followed by Italy and the United States (37.2% of the total trips abroad).

Comparing tourism expenditures and receipts, tourism presented a positive balance of EUR 8 037 million in 2004.

### 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	8 342	8 329	8 689	8 899
Number of bed places	607 614	606 330	644 898	668 271

### 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin						Monthly distribution of nights spent in collective accommodation, in 1 000			
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000										
2001	13 615	44 132	DE	27.2	UK	23.0	IT	5.8	August	2 571	September	9 017
2002	13 514	40 953	DE	26.2	UK	20.5	FR	6.0	August	2 657	August	8 135
2003	14 095	40 408	DE	25.4	UK	20.1	FR	6.7	August	2 772	August	8 382
2004	:	:	:	:	:	:	:	:	:	:	:	:
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination						Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000			
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
2001	449	10.0	DE	16.3	IT	14.8	US	6.1	August	1 329	August	72
2002	420	9.6	IT	11.7	DE	7.9	FR	6.9	August	1 185	August	87
2003	:	:	:	:	:	:	:	:	:	:	:	:
2004	:	:	:	:	:	:	:	:	:	:	:	:

## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>		total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total	%	Mio. €	Mio. €
42 345	504 790	83.9	8.3	837 557	19.8	:	17 866	6.7	3.1	8 907	37 249

## 5.2 Recent trends

Spain is strengthening its role as one of the major tourism destinations in Europe. Preliminary figures for 2004 showed an increase of 1.8% in the number of hotels and similar establishments, consistent with the trend of the previous years (+2.2% in 2002 and 2003). Bed places followed the same trend, but showed a higher growth rate (+4.1%). That means an increase in the average size of establishments from 81 bed places in 2001 to 87 in 2004.

Domestic demand recorded steady growth at the beginning of the 21st century. In 2004, nights spent by residents increased by 8.4% in comparison to 2003, continuing the expansion of the previous years (+5.5% in 2003 and +4.1% in 2002). On the contrary, nights spent by non-residents decreased during the same period: -3.6% in 2004, -1.3% in 2003 and -4.6% in 2002.

The United Kingdom, Germany and France were the top markets of origin, accounting for about 67% of total international tourism nights. Considering national tourism (domestic + inbound), the ratio of tourists/resident in 2004 was 8.3.

As for outbound tourism, Spanish tourists made 2.8 million holiday trips of 4 nights and more abroad in 2004, an increase of 13.1% compared to 2003. This was the strongest growth since the beginning of the 21st century, after the downturn in 2002 (-9.4%) due to the effects of 11 September. France, Portugal and Italy were the main tourism destinations, accounting for about 43% of total tourism trips abroad (43.1% in 2001).

Comparing tourism expenditures and receipts, tourism presented a positive balance of EUR 28 342 million in 2004.

### 5.3 Key figures tourism supply

	2001	2002	2003	2004
Number of establishments	16 369	16 732	17 102	17 402p
Number of bed places	1 333 441	1 393 930	1 451 922	1 511 592p

### 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin						Monthly distribution of nights spent in collective accommodation, in 1 000			
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000										
2001	113 486	231 443	DE	31.1	UK	29.9	FR	6.1	August	23 312	August	32 242
2002	118 170	220 699	UK	32.1	DE	27.4	FR	6.6	August	24 576	August	32 251
2003	124 689	217 851	UK	32.4	DE	27.9	FR	6.7	August	25 814	August	32 412
2004	135 118p	209 931p	UK	31.7p	DE	28.8p	FR	6.3p	August	27 409p	August	30 610p
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination						Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000			
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
2001	2 638	9.0	FR	22.7	PT	12.6	IT	7.8	August	8 609	August	713
2002	2 389	10.3	FR	22.8	PT	13.2	IT	8.9	August	8 595	August	756
2003	2 493	10.8	FR	21.5	PT	12.8	IT	10.9	August	8 968	August	872
2004	2 820	11.9	FR	19.0	PT	14.6	IT	9.1	August	8 848	August	917

## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>		total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total	%	Mio. €	Mio. €
59 901	543 965	110.1	4.7	1 648 369	27.5	:	24 388	3.3	2.3	22 710	32 833

## 5.2 Recent trends

France is both one of the main tourism destinations in the world and a producer of international tourism. Figures for hotel accommodation supply in 2003 showed a strong decrease in establishments and bed places compared to 2002 (-8.4% and -25.8% respectively), after a small increase in 2002 (+0.2% and +1.1%). Consequently, the number of bed places per establishment declined from 81 in 2001 to 66 in 2003.

The trend in domestic demand was up-and-down between 2001 and 2004. In 2004, nights spent by residents almost stagnated (-0.3%), after an increase of 1.7% in 2003, which compensated for the 1.5% decline in 2002. They accounted for about 63% of total tourism nights in the country. Nights spent by non-residents remained relatively stable in 2004 (+0.4%), after a sharp decrease in 2003 (-8.4%) and growth in 2002 (+2.7%).

The United Kingdom, Germany and Italy were the main markets of origin, accounting for about 44% of total international tourism nights. Considering national tourism (domestic + inbound), the ratio of tourists/resident in 2004 was 4.7.

As for outbound tourism, in 2004 French tourists made 13.9 million holiday trips of 4 nights and more abroad - an increase of 10.9% in comparison to 2003. This is the strongest growth since 2001, after stagnating between 2002 and 2003. Spain, Italy and the United Kingdom were the main tourism destinations, accounting for about 28% of total tourism trips abroad in 2004 (29.2% in 2001).

Comparing tourism expenditures and receipts, tourism presented a positive balance of EUR 10 123 million in 2004.

## 5.3 Key figures: tourism supply

	2001	2002	2003	2004	
Number of establishments	19 928	19 889	18 217		:
Number of bed places	1 607 781	1 625 537	1 206 558		:

## 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin						Monthly distribution of nights spent in collective accommodation, in 1 000			
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000										
2001	179 039	110 261	UK	22.4	US	12.5	DE	11.0	August	45 253	July	24 257
2002	176 299	113 241	UK	23.4	DE	10.9	US	10.7	August	44 089	July	24 334
2003	179 352	103 744	UK	23.9	DE	10.5	IT	10.1	August	44 476	July	22 330
2004	178 840	104 178	UK	23.5	DE	10.3	IT	9.8	August	42 542	July	21 313
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination						Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000			
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
2001	12 156	15.8	ES	16.8	IT	9.8	US	3.6	:	:	:	:
2002	12 546	15.7	ES	17.2	IT	11.2	US	3.4	August	18 240	August	2 225
2003	12 493	15.8	ES	17.4	IT	11.3	UK	3.0	August	17 571	August	2 136
2004	13 856	17.1	ES	14.7	IT	9.5	UK	4.0	August	17 227	August	2 373

## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident 1	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
in 1 000	in km2	inhabitants/km2		total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total	%	Mio. €	Mio. €
4 028e	70 273	57.3	8.1	148 557	36.9	:	1 836	5.9	2.3	4 178	3 445

1) 2002 data.

## 5.2 Recent trends

Ireland is a country of origin of international tourism, but for several years it has also been growing as a tourism destination. From 2001 to 2003, hotel accommodation supply showed a steady decrease in terms of the number of establishments (annual average decrease of 3.9%) and an increase in bed places (+2.8% in 2002 and +0.9% in 2003), which resulted in an increase in the average size of hotels and similar accommodation from 27 bed places in 2001 to 30 in 2003.

Domestic demand grew considerably from 2001 to 2002, with the number of nights spent by residents rising from 10.3 million to 11.7 million (+13.2%), or about 37% of total tourist nights in the country. In the same period, nights spent by non-residents fell 1.5% from 20.3 million to just under 20 million.

Considering national tourism (domestic + inbound), the ratio of tourists/resident in 2002 was 8.1.

Outbound tourism recorded a boom from 2002 to 2003. In 2003, Irish tourists made 2.6 million holiday trips of 4 nights and more abroad, an increase of 32.6% compared to 2002. This increase was so high because of a slump from 2001 to 2002 (-8.3%) due to the effects of 11 September. Spain, the United Kingdom and the United States were the main tourism destinations, accounting for about 60% of total tourism trips abroad, with the USA passing France in 2003.

Comparing tourism expenditures and receipts, tourism posted a negative balance of EUR 733 million in 2004.

## 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	5 222	5 009	4 821	:
Number of bed places	140 966	144 963	146 231	:

## 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin						Monthly distribution of nights spent in collective accommodation, in 1 000			
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000										
2001	10 292	20 258	:c	:c	:c	:c	:c	:c	:	:	August	3 372
2002	11 653	19 957	:c	:c	:c	:c	:c	:c	August	2 382	August	3 031
2003	:	:	:	:	:	:	:	:	:	:	August	3 399
2004	:	:	:	:	:	:	:	:	:c	:c	:c	:c
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination						Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000			
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
2001	2 161	67.2	ES	32.6	UK	17.6	US	9.7	August	255	July	346
2002	1 980	73.8	ES	30.0	UK	18.7	FR	10.6	August	206	July	327
2003	2 626	71.1	ES	32.3	UK	17.7	US	9.6	August	255	July	384
2004	:	:	:	:	:	:	:	:	:	:	:	:



## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident <sup>1</sup>	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>		total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total	%	Mio. €	Mio. €
57 888e	301 333	192.1	6.0	1 351 328	23.3	:	22 438	4.6	2.3	16 655	28 430

1) 2003 data.

## 5.2 Recent trends

Italy is one of the main tourism destinations in the world, but its role as a country of origin of international tourism has also been growing rapidly in recent years. Figures on hotel accommodation supply show a stable number of establishments and a slow increase in bed places from 2001 to 2003 (+2.0% each year, from about 1.9 million to almost 2.0 million). This increased the average size of hotels and similar accommodation from 57 bed places in 2001 to 59 in 2003.

Domestic demand revealed an up-and-down trend at the beginning of the 21st century. Nights spent by residents (almost 60% of total tourist nights) rose by 2.5% in 2003 compared to 2002 (from about 200 million to almost 205 million). This growth offset the 1.9% fall in 2002. In the same period, nights spent by non-residents declined overall in 2003 (down 4%, from 145.6 million to 139.6 million).

Germany, the United Kingdom and the United States were the main countries of origin, accounting for about 47% of total international nights (49.0% in 2001). Taking national tourism (domestic + inbound), the ratio of tourists/resident in 2003 was 6.0.

As for outbound tourism, in 2004, Italian tourists made 9.2 million holiday trips of 4 nights and more abroad (+8.7%), representing about 25% of total trips made by residents. This expansion came after a stagnation in 2003 and growth of 1.5% in 2002. According to preliminary figures, France, Spain and Greece were the main tourism destinations, accounting for about 34% of total tourism trips abroad in 2004.

Comparing tourism expenditures and receipts, tourism showed a positive balance of EUR 11 775 million in 2004.

### 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	33 421	33 411	33 480	:
Number of bed places	1 891 281	1 929 544	1 969 495	:

### 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin						Monthly distribution of nights spent in collective accommodation, in 1 000			
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000										
2001	203 651	146 672	DE	32.0	UK	9.0	US	8.0	August	53 487	July	26 196
2002	199 687	145 560	DE	30.8	UK	9.1	US	7.9	August	52 418	July	14 636
2003	204 760	139 654	DE	29.6	UK	9.7	US	7.7	August	52 864	July	24 068
2004	:	:	:	:	:	:	:	:	August	51 231p	July	22 997p
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination						Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000			
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
2001	8 402	23.9	FR	18.8	ES	14.0	EL	9.5	August	8 786	August	2 507
2002	8 531	23.0	FR	19.0	ES	10.7	EL	8.0	August	9 607	August	2 593
2003	8 496	23.6	FR	16.6	ES	14.5	EL	8.5	August	9 833	August	2 271
2004	9 232	24.9	FR	13.6p	ES	13.4p	EL	7.2p	August	9 563p	August	2 536p

## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>		total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total	%	Mio. €	Mio. €
730	5 695	128.2	20.6	12 402	17.0	:	336	8.9	1.9	650	1 815

## 5.2 Recent trends

Cyprus is mainly a destination for international tourism. The hotel accommodation supply has shown a varied trend since 2001. After an annual average growth of about 1.7% from 2001 to 2003, the number of establishments fell back in 2004 to the 2001 level. On the other hand, bed places recorded a steady expansion in the same period: +2.6% in 2002, +1.5% in 2003, and +0.9% in 2004. This meant an increase in the number of bed places per establishment from 110 in 2001 to 115 in 2004.

Domestic demand has shown double-digit growth since 2001. In 2004, nights spent by residents increased by 11.7% in comparison to 2003, following the same trend as the previous years (+11.3% in 2003 and +18.0% in 2002). Nights spent by non-residents (almost 93% of total nights) showed a slight recovery in 2004 (+1.1%), after the downturn of the previous years (-11.8% in 2003 and -15.5% in 2002).

The United Kingdom, Germany and Sweden were the main markets of origin, with UK accounting for more than half of the total international tourist nights.

Considering national tourism (domestic + inbound), the ratio of tourists/resident in 2004 was very high: 20.6 tourists per resident.

As for outbound tourism, in 2004 tourists from Cyprus made 470 000 holiday trips of 4 nights and more abroad, an increase of 15.5% compared to 2003. Greece, the United Kingdom and France were the main destinations, with Greece accounting for more than 41% of total tourism trips abroad.

Comparing tourism expenditures and receipts, tourism presented a positive balance of EUR 1 165 million in 2004.

### 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	801	813	829	803
Number of bed places	87 834	90 112	91 419	92 239

### 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin						Monthly distribution of nights spent in collective accommodation, in 1 000			
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000							August	August		
2001	737	18 089	UK	55.2	DE	10.9	SE	5.2	August	209	August	2 638
2002	870	15 289	UK	55.6	DE	9.6	SE	4.7	August	278	August	2 180
2003	968	13 490	UK	58.6	DE	7.8	SE	4.8	August	297	August	2 060
2004	1 081	13 636	UK	56.0	DE	9.5	SE	4.9	August	320	August	1 948
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination						Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000			
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
2001	:	:	:	:	:	:	:	:	:	:	:	:
2002	412	:	:	:	:	:	:	:	:	:	August	103
2003	407	:	EL	43.3	UK	14.7	FR	2.0	:	:	August	92
2004	470	:	EL	41.3	UK	14.9	FR	2.8	:	:	August	121

## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident <sup>1</sup>	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>		total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total	%	Mio. €	Mio. €
2 319	64 589	35.9	0.8	11 024	4.8	:	1 021	2.2	6.2	305	217

1) 2003 data.

## 5.2 Recent trends

Along with Estonia and Lithuania, Latvia is one of the new Member States which are emerging origins/destinations of international tourism in Europe. Hotel accommodation supply expanded rapidly at the beginning of the 21st century in terms of both the number of establishments and bed places (an average increase of 14.5% and 6.8% respectively from 2001 to 2003). This caused a decline in the number of bed places per establishment from 66 in 2001 to 57 in 2003.

Domestic demand grew in the past two years. Nights spent by residents (about 46% of total tourist nights in the country in 2003) rose from 769 000 in 2001 to 825 000 in 2003 (+3.6% on average each year). Nights spent by non-residents showed a strong expansion, especially between 2002 and 2003 (+12.7%, from 872 000 to 983 000). Germany, Finland and the United Kingdom were the main countries of origin, accounting for about 31% of total international nights.

Considering national tourism (domestic + inbound), the ratio of tourists/resident in 2003 was 0.8.

Outbound tourism contracted in 2004. Holiday trips abroad of 4 nights and more, which represented about 58% of total trips made by residents, declined from 305 000 to 270 000 (down 11.5%). In 2004, Germany, Sweden and the United States were the main tourism destinations, accounting for about 20% of total tourism trips abroad.

Comparing tourism expenditures and receipts, tourism showed a negative balance of EUR 88 million in 2004.

### 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	199	223	261	:
Number of bed places	13 139	13 744	14 983	:

### 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin					Monthly distribution of nights spent in collective accommodation, in 1 000				
	by residents	by non-residents										
	in 1 000	in 1 000	1st market	2nd market		3rd market		by residents		by non-residents		
2001	769	847	:	:	:	:	:	:	:	:	:	:
2002	821	872	:	:	:	:	:	:	:	:	:	:
2003	825	983	DE	12.9	FI	12.4	UK	5.6	July	101	July	161
2004	:	:	:	:	:	:	:	:	July	110	July	199
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination					Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000				
	in 1 000	as % of total trips										
	in 1 000	as % of total trips	1st market	2nd market		3rd market		in the country		abroad		
2001	:	:	:	:	:	:	:	:	:	:	:	:
2002	:	:	:	:	:	:	:	:	:	:	:	:
2003	305	58.1	DE	11.1	SE	6.9	IT	5.7	July	61	:	:
2004	270	:	DE	8.6	SE	6.7	US	4.6	:	:	:	:

## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>		total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total	%	Mio. €	Mio. €
3 446	65 300	52.8	0.6	17 926	5.2	:	1 437	2.2	1.1	515	659

## 5.2 Recent trends

Lithuania, like Estonia and Latvia, is an emerging origin/destination of international tourism in Europe. Like Latvia, its hotel accommodation supply has expanded rapidly since the beginning of the 21st century. In terms of hotels and similar establishments, there was an annual average increase of 11.1% between 2001 and 2004, but an even bigger increase in bed places, at +18.9%. This also led to an increase in the number of bed places per establishment from 48 in 2001 to 59 in 2004.

Domestic demand revealed an up-and-down trend over the past four years. Nights spent by residents (about 44.8% of total tourist nights in the country) rose from 824 000 in 2003 to 971 000 in 2004 (+17.8%). This increase offset the decline Lithuania faced in 2003 (-3.8%) after the growth recorded in 2002 (+11.4%).

On the other hand, nights spent by non-residents experienced a boom during the same years, rising from 735 000 in 2001 to 1 197 000 in 2004 (an average increase of 17.6% each year). Germany, Poland and the United Kingdom were the main countries of origin, accounting for about 35% of total international nights. Considering national tourism (domestic + inbound), the ratio of tourists/resident in 2004 was 0.6.

Looking at outbound tourism, tourists from Lithuania made about 567 000 holiday trips of 4 nights and more abroad in 2004. Germany, Sweden and Poland were the main tourism destinations, accounting for about 28% of total tourism trips abroad.

Comparing tourism expenditures and receipts, tourism presented a positive balance of EUR 144 million in 2004.

### 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	231	247	270	317
Number of bed places	11 071	11 980	14 346	18 630

### 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin					Monthly distribution of nights spent in collective accommodation, in 1 000				
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000										
2001	769	735	:	:	:	:	:	:	:	:	:	:
2002	857	799	DE	16.4	PL	12.6	US	4.8	:	:	:	:
2003	824	835	DE	16.4	PL	11.6	UK	5.8	:	:	:	:
2004	971	1 197	DE	16.7	PL	13.1	UK	5.6	July	195	August	201
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination					Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000				
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
2001	:	:	:	:	:	:	:	:	:	:	:	:
2002	:	:	:	:	:	:	:	:	:	:	:	:
2003	:	:	:	:	:	:	:	:	:	:	:	:
2004	567	61.2	DE	16.0	SE	6.3	PL	6.1	September	92	:	:



## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>		total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total	%	Mio. €	Mio. €
452	2 586	174.8	6.0	25 664	56.8	:	186	3.2	3.2	2 690	2 947

## 5.2 Recent trends

Luxembourg is an important business trip destination but also an international tourism spender. Figures for the number of hotels and similar establishments revealed a decrease of 3.3% in 2004 (-2.8% from 2002 to 2003). After a relatively stable year in 2003, bed places continued the same trend but at a lower rate (-2.7%). The average number of bed places per establishment was 48 in 2004 compared to 46 in 2001.

Domestic demand has recorded an up-and-down trend since 2001. In 2004, nights spent by residents increased by 3.6% compared to 2003 (from 219 000 to 227 000), returning to almost the same level as in 2002 and making up the decrease of -2.2% between 2002 and 2003. On the other hand, nights spent by non-residents (nearly 92% of total tourism nights in the country) decreased by 2.0% in 2004 after steady growth between 2001 and 2003.

Belgium, the Netherlands and Germany were the top markets of origin, accounting for more than half of total international tourism nights. Looking at national tourism (domestic + inbound), the ratio of tourists/resident in 2004 was 6.0.

As for outbound tourism, in 2003 residents made 634 000 holiday trips of 4 nights and more abroad, which accounted for more than 99% of total holiday trips. However, compared to 2002 there was a decrease of 4.7% after an upsurge between 2001 and 2002 of 18.3%. France, Spain and Italy were the main tourism destinations (about 44% of total tourism trips abroad in 2003 compared to more than 46% in 2001).

Comparing tourism expenditures and receipts, tourism showed a positive balance of EUR 257 million in 2004.

## 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	309	316	307	297
Number of bed places	14 185	14 562	14 638	14 237

## 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin						Monthly distribution of nights spent in collective accommodation, in 1 000			
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000										
2001	214	2 397	BE	25.4	DE	13.5	NL	12.9	July	34	July	535
2002	224	2 446	BE	23.7	NL	15.2	DE	13.6	July	32	July	570
2003	219	2 517	BE	23.9	NL	15.6	DE	14.3	June	29	July	602
2004	227	2 467	BE	23.5	NL	15.4	DE	13.9	July	31	July	510
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination						Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000			
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
2001	562	99.6	FR	24.3	ES	12.8	IT	9.1	August	1	August	116
2002	665	99.3	FR	22.4	ES	11.9	IT	11.1	July	1	August	121
2003	634	99.4	FR	22.2	ES	11.4	IT	10.1	July	1	August	125
2004	:	:	:	:	:	:	:	:	:	:	:	:

## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident <sup>1</sup>	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>		total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total	%	Mio. €	Mio. €
10 117	93 029	108.8	1.8	80 816	8.0	:	3 894	3.8	6.8	2 302	3 262

1) 2003 data.

## 5.2 Recent trends

Hungary is mainly a destination for tourists, coming from within Hungary or from abroad. The 2004 figures for the number of hotels and similar establishments revealed a decrease of 20.5%, against the strong growth in 2003 (+4.3%) and 2002 (+8.7%). This decline also affects the number of bed places, but to a lesser extent (6.0%), virtually cancelling out the increases in 2003 (+2.6%) and 2002 (+4.3%). Consequently, the average number of bed places per establishment rose from 74 in 2001 to 83 in 2004.

Domestic demand expanded rapidly during the first years of the new century. In 2003 nights spent by residents increased by 6.0% (from almost 8.1 to nearly 8.6 million), following on from the 4.3% increase in the year before. The opposite was the case for nights spent by non-residents (about 54% of total tourism nights in the country)

which showed a steady decline over the same period (-3.1% in 2003 and -4.9% in 2002). Germany, Austria and Italy were the top markets of origin, accounting for about 49% of total international tourism nights in 2003. Germany alone accounted for more than one third of total international nights. Taking national tourism (domestic + inbound), the ratio of tourists/resident in 2003 was 1.8.

As for outbound tourism, in 2004 residents made 1.48 million holiday trips of 4 nights and more abroad, which accounted for about 27% of total holiday trips by Hungarians.

Comparing tourism expenditures and receipts, tourism presented a positive balance of EUR 960 million in 2004.

### 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	1 994	2 167	2 261	1 797p
Number of bed places	148 225	154 643	158 634	149 142p

### 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin						Monthly distribution of nights spent in collective accommodation, in 1 000			
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000										
2001	7 754	10 894	DE	36.8	AT	6.8	IT	5.6	August	1 388	July	2 007
2002	8 089	10 361	DE	35.2	AT	7.3	IT	5.3	July	1 436	July	1 797
2003	8 571	10 040	DE	33.4	AT	7.2	IT	5.7	August	1 546	August	1 659
2004	:	:	:	:	:	:	:	:	August	1 428p	August	1 630p
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination						Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000			
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
2001	:	:	:	:	:	:	:	:	:	:	:	:
2002	:	:	:	:	:	:	:	:	:	:	:	:
2003	:	:	:	:	:	:	:	:	:	:	:	:
2004	1 481	27.2	:	:	:	:	:	:	:	:	:	:

## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>		total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total	%	Mio. €	Mio. €
400	316	1 265.8	:	4 277	10.7	:	146	8.2	2.7	206	629

## 5.2 Recent trends

The island of Malta is mainly a destination for international tourism. Trends in hotel accommodation supply varied during the first four years of the 21st century. After a decline in 2002 (-11.7%) and growth in 2003 (+3.6%), the number of establishments again decreased (-7.8%) in 2004. The number of bed places followed the same trend: falling in 2002 (-1.6%), rising in 2003 (+3.6%) and falling again in 2004 (-6.0%). As a result the number of bed places per establishment increased from 181 in 2001 to 206 in 2004.

As for tourism demand, no data are available on domestic tourism, but they are included in the figures for non-residents and are thought to be very low.

International tourism stagnated in 2004 after showing a positive trend in the previous years. Nights spent by non-residents fell in 2004 (-1.3%), after rising by 5.8% in 2003 and by 12.8% in 2002. The United Kingdom, Germany and France were the top markets of origin (61.5%) in 2004, with the UK accounting for more than 43% of total international tourist nights.

Comparing tourism expenditures and receipts, tourism presented a positive balance of EUR 423 million in 2004.

## 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	223	197	204	188
Number of bed places	40 425	39 774	41 207	38 750

## 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin						Monthly distribution of nights spent in collective accommodation, in 1 000			
	by residents	by non-residents <sup>1</sup>	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000										
2001	:	9 310	UK	44.7	DE	14.2	FR	6.6	:	:	July	930
2002	:	10 506	:	:	:	:	:	:	:	:	:	:
2003	:	11 116	:	:	:	:	:	:	:	:	:	:
2004	:	10 974	UK	43.7	DE	11.3	FR	6.5	:	:	August	1 605
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination						Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000			
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
2001	:	:	:	:	:	:	:	:	:	:	:	:
2002	:	:	:	:	:	:	:	:	:	:	:	:
2003	:	:	:	:	:	:	:	:	:	:	:	:
2004	:	:	:	:	:	:	:	:	:	:	:	:

1) Malta does not collect separately data on residents, they are included in non-residents.

## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>		total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total	%	Mio. €	Mio. €
16 258	33 873	480.0	5.0	488 642	30.1	:	8 101	3.8	1.4	13 296	8 248

## 5.2 Recent trends

The Netherlands is one of the principal generators of international tourism in Europe. Figures for the number of hotels and similar establishments revealed a growth rate of 7.6%, pointing to a recovery after the stagnation in 2003. Bed places followed the same trend, but at a lower rate of growth (+5.4%). This resulted in a small reduction in the average size of establishments (from 62 bed places in 2003 to 61 in 2004).

Nights spent by residents decreased slightly in 2004 in comparison to 2003 (down 0.6%, from 55.9 to 55.5 million), showing a continuation of the trend from 2002 to 2003 (-0.2%) after an increase between 2001 and 2002 (+1.9%). Nights spent by non-residents remained the same in 2004, after falling by 3.9% in 2003 and rising by 3.4% in 2002. The United Kingdom, Germany and the United States were the top three markets of origin, but their share of total international nights fell from 55.2% in 2001 to 51.4% in 2004.

Considering total tourism in the country (domestic + inbound), the ratio of tourists/resident in 2004 was 5.0.

Taking into account outbound tourism, holidays of 4 nights and more spent abroad rose by 4.4% in 2004 (from 11.0 to 11.5 millions), making up around 62% of total trips made by Dutch tourists. France, Germany and Spain were the main destinations in 2004, with Germany passing Spain in comparison to 2003. However, the share of the three main destinations on total trips abroad fell from 41.2% in 2001 to 38.9% in 2004.

Comparing tourism expenditures and receipts, tourism presented a negative balance of EUR 5 048 million in 2004.

## 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	2 858	2 933	2 908	3 129
Number of bed places	174 314	177 435	180 158	189 835

## 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin						Monthly distribution of nights spent in collective accommodation, in 1 000			
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000										
2001	54 973	25 502	UK	24.4	DE	17.8	US	13.0	August	11 178	August	3 695
2002	56 004	26 368	UK	23.4	DE	18.8	US	11.4	August	11 200	August	4 421
2003	55 864	25 341	UK	22.2	DE	20.1	US	10.2	August	10 955	August	4 692
2004	55 526	25 386	UK	21.6	DE	18.5	US	11.3	August	10 841	August	4 107
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination						Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000			
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
2001	9 951	61.9	FR	17.3	ES	13.9	DE	10.0	July	1 429	July	2 173
2002	10 981	60.9	FR	17.9	ES	12.7	DE	11.7	July	1 506	July	1 971
2003	11 032	61.2	FR	16.1	ES	12.6	DE	11.9	July	1 487	July	2 041
2004	11 519	62.3	FR	15.8	DE	12.1	ES	11.0	July	1 394	July	2 012



## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>		total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total	%	Mio. €	Mio. €
8 140p	83 859	97.1	11.8	237 039	29.1	:	3 742	5.7	2.0	9 177	12 390

## 5.2 Recent trends

Austria is expanding its role as a generator of outbound tourism. The hotel accommodation supply decreased in the first years of the 21st century. Figures for 2004 highlight a reduction in the number of establishments (-1.9% in comparison to 2003), confirming the trend of the previous years (-1.4% in 2002-2003 and -2.5% in 2001-2002). The number of bed places showed a slight increase in 2004 (+0.8%), after stagnating in 2003 (-0.5%) and falling in 2002 (down 3.1% on 2001). Consequently, the average size of establishments rose to almost 40 bed places in 2004, compared to 38 in 2001.

Domestic demand is also declining. Nights spent by residents remained stable in 2004 in comparison to 2003, halting the negative trend for 2002-2003 (-5.2%) and 2001-2002 (-1.1%). On the other hand, nights spent by non-residents continued to rise: +2.8% in 2002, +1.3% in 2003 and +0.7% in 2004.

Germany, the Netherlands and Switzerland/United Kingdom (ranked equal third in 2004) were the top markets of origin, with Germany accounting for more than half of total international tourist nights. Considering national tourism (domestic + inbound), the ratio of tourists/resident in 2004 was 11.8. As for outbound tourism, holiday trips abroad of 4 nights and more were stable in 2004 (+0.2%), after a boom in 2003 (+54.8%) and a decrease in 2002 (-6.6%), probably due to the effects of 11 September. In 2004, trips abroad represented 64.7% of total trips. Italy, Greece and Spain were the main destinations of Austrian tourists in 2003 and their share is stable over the years (about 40% of total trips abroad).

Comparing tourism expenditures and receipts, tourism presented a positive balance of EUR 3 213 million in 2004.

## 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	15 293	14 914	14 708	14 435
Number of bed places	587 305	569 306	566 274	570 785

## 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin						Monthly distribution of nights spent in collective accommodation, in 1 000			
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000										
2001	28 815	65 523	DE	59.3	NL	7.1	UK	4.9	August	3 688	August	8 993
2002	28 509	67 346	DE	58.7	NL	7.4	UK	5.1	August	3 629	August	9 182
2003	27 023	68 217	DE	57.7	NL	7.4	CH	5.1	August	3 700	August	10 096
2004	26 980	68 270	DE	55.6	NL	7.3	CH/UK	5.3	August	3 531	August	9 822
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination						Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000			
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
2001	3 500	64.9	IT	23.5	EL	8.7	ES	7.4	August	448	August	803
2002	3 270	66.3	IT	24.1	EL	9.4	ES	6.2	August	408	August	768
2003	5 062	63.1	IT	23.1	EL	9.3	ES	8.2	August	518	July	969
2004	5 072	64.7	:	:	:	:	:	:	:	:	:	:

## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
				total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total			
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>							%	Mio. €	Mio. €
38 191	312 685	122.1	1.2	195 206	5.1	:	13 682	1.7	3.6	3 144	4 690

## 5.2 Recent trends

Poland is an emerging tourism market in Europe. Hotel supply showed a steady increase since 2001 for both the number of establishments and bed places, leading to a boom between 2003 and 2004 (+38.3% and +23.1% respectively) according to preliminary figures for 2004. As a result of this hotel boom, the average number of bed places per establishment decreased from 85 in 2001 to 77 in 2004.

Domestic demand revealed a varied trend in the same period. Nights spent by residents - which represent about 80% of total tourist nights in the country - stagnated in 2004 after growth of 1.1 % in 2003, which partially compensated for the decline recorded in 2002 (-4.7%). Nights spent by non-residents posted a sharp increase, rising from 7.0 million to 9.3 million between 2001 and 2004 (up 10.0% on annual average). Germany, the United Kingdom and the United States were the main markets of origin, accounting for about 49% of total international tourist flows.

Considering total tourism in the country (domestic + inbound), the ratio of tourists/resident in 2004 was 1.2.

Looking at outbound tourism, 2004 data showed that holidays of 4 nights and more spent by Polish tourists abroad fell by 21.2% in comparison to 2003 (from 3.8 millions to 3.0 millions). This represents about 18% of total trips made by residents compared to 20.2% in 2003. Germany, Italy and Slovakia were the main destinations, accounting for about 42% of total trips abroad.

Comparing tourism expenditures and receipts, tourism presented a positive balance of EUR 1 546 million in 2004.

### 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	1 391	1 478	1 547	2 139p
Number of bed places	118 213	127 559	134 323	165 311p

### 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin					Monthly distribution of nights spent in collective accommodation, in 1 000				
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000										
2001	38 956	6 990	:	:	:	:	:	:	:	:	:	:
2002	37 127	7 085	:	:	:	:	:	:	:	:	:	:
2003	37 520	7 828	DE	37.4	UK	5.9	US	5.6	July	7 618	August	1 146
2004	37 344p	9 313p	:	:	:	:	:	:	July	7 079	August	1 333
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination					Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000				
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
2001	:	:	:	:	:	:	:	:	:	:	:	:
2002	:	:	:	:	:	:	:	:	:	:	:	:
2003	3 840	20.2	DE	28.9	IT	8.0	SK	5.9	August	4 100	August	930
2004	3 026	18.2	DE	29.4	IT	6.8	SK	5.3	July	3 224e	July	582e

## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident <sup>1</sup>	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>		total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total	%	Mio. €	Mio. €
10 475	91 906	114.0	4.0	141 115	13.5	:	5 125	5.2	2.5	2 224	6 260

1) 2003 data.

## 5.2 Recent trends

Portugal is traditionally a destination within the European tourism market. From 2001 to 2003 the number of establishments rose by 4.2% each year. The number of bed places also increased, but at a lower annual average growth rate (+3.7%). Consequently, the number of bed places per hotel declined from 128 in 2001 to 127 in 2003.

Considering nights spent by residents - which accounted for about 40% of total nights in the country - the situation was stable in 2003 after growing by 3.6% in 2002 (from 16.1 million to 16.7 million). Nights spent by non-residents declined in the same periods (-1.0% in 2002-2003 and -0.4% in 2001-2002). The United Kingdom, Germany and Spain were the main markets of origin, accounting for about 58% of total international tourism nights. The United Kingdom alone accounted for about one third of international tourism nights in the country.

Considering national tourism (domestic + inbound), the ratio of tourists/resident in 2003 was 4.0.

As for outbound tourism, holidays by Portuguese tourists abroad showed an up-and-down trend between 2001 and 2004. After a boom in 2002 (+18.7%), they recorded a decline in 2003 (-22.7%) and a new upsurge in 2004 (+54.6%, jumping from 608 000 to 940 000). Spain, France and the United Kingdom were the main foreign destinations (56% of total holidays).

Comparing tourism expenditures and receipts, tourism presented a positive balance of EUR 4 036 million in 2004.

## 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	1 781	1 898	1 934	:
Number of bed places	228 665	239 903	245 778	:

## 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin						Monthly distribution of nights spent in collective accommodation, in 1 000			
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000							August	August	August	August
2001	16 111	25 229	UK	30.8	DE	19.2	ES	8.1	August	3 859	August	3 361
2002	16 692	25 119	UK	31.4	DE	17.4	ES	8.8	August	4 115	August	3 557
2003	16 713	24 870	UK	31.8	DE	16.8	ES	9.3	August	4 163	August	3 485
2004	:	:	:	:	:	:	:	:	August	3 874p	August	3 311p
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination						Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000			
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
									August	August	August	August
2001	663	15.8	ES	39.6	FR	13.7	US	4.3	August	1 217	August	179
2002	787	18.3	ES	41.6	FR	12.6	US	2.9	August	1 201	August	248
2003	608	17.0	ES	34.2	FR	20.1	IT	3.2	August	1 083	August	161
2004	940	22.6	ES	35.7	FR	11.0	UK	9.5	August	1 090	August	182

## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>		total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total	%	Mio. €	Mio. €
1 996	20 273	98.5	3.7	25 895	13.0	:	946	4.0	3.6	731	1 311

## 5.2 Recent trends

Slovenia is strengthening its role as a tourism destination in Europe. In 2004, data on accommodation supply revealed a decrease in the number of hotels and similar establishments (-8.1% in comparison to 2003), while bed places continued their steady growth (+0.9% in 2002, +3.4% in 2003, and +1.7% in 2004). This means an expansion in the number of bed places per establishment from 73 in 2001 to 85 in 2004.

Focusing on domestic tourism, nights spent by residents decreased by 2.8% in 2004 after a relatively stable period between 2001 and 2003. In 2004, resident nights accounted for 42.6% of total nights. On the other hand, nights spent by non-residents continued to expand during the first years of the 21st century (+5.3% in 2002, +4.3% in 2003, and +4.8% in 2004).

Italy, Austria and Germany were the main markets of origin, accounting for about 54% of total international tourism nights (about 59% in 2001). In 2004, Austria ranked second, passing Germany.

Considering national tourism (domestic + inbound), the ratio of tourists/resident in 2004 was 3.7.

As for outbound tourism, in 2004 Slovenian tourists made 1.1 million holiday trips of 4 nights and more abroad (+1.2%), which represented about 73% of total trips. Most of these trips were to the neighbouring countries of Croatia, Bosnia, Serbia, Italy and Austria.

Comparing tourism expenditures and receipts, tourism presented a positive balance of EUR 580 million in 2004.

## 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	381	393	381	350
Number of bed places	27 695	28 211	29 179	29 668

## 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin						Monthly distribution of nights spent in collective accommodation, in 1 000			
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000										
2001	3 219	3 640	DE	21.4	IT	20.5	AT	17.2	August	533	August	617
2002	3 195	3 832	IT	20.3	DE	19.7	AT	17.4	August	516	August	633
2003	3 203	3 996	IT	19.8	DE	18.1	AT	17.5	August	495	August	691
2004	3 113	4 188	IT	20.9	AT	16.8	DE	16.0	August	478	August	739
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination						Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000			
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
2001	:	:	:	:	:	:	:	:	:	:	:	:
2002	:	:	:	:	:	:	:	:	:	:	:	:
2003	1 108	72.6	:	:	:	:	:	:	August	86	August	353
2004	1 121	73.0	:	:	:	:	:	:	July	111	July	375



## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident <sup>1</sup>	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>		total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total	%	Mio. €	Mio. €
5 380	49 035	109.7	2.2	33 119	6.2	:	2 149	3.8	7.4	601	727

1) 2003 data.

## 5.2 Recent trends

Like other Eastern countries, the Slovak Republic is an emerging origin/destination on the European tourism market. Accommodation supply has shown a steady growth since 2001. The number of hotels and similar establishments increased at an average annual growth rate of 4.5%, from 764 in 2001 to 873 in 2004. In the same period, the number of bed places rose from 48 723 to 56 296 (+4.9% on average each year). This means that there was not much change in the average number of bed places per establishment (64.5 in 2004 against 63.8 in 2001).

Regarding domestic tourism, the number of nights spent by residents fell in 2003 compared to 2002 by -2.4%. During the preceding period, it had been growing by +4.5%. In 2003 resident nights accounted for about 59% of total nights. The same trend applies to international tourism. Nights spent by non-residents declined in

2003 (-2.2%, from almost 5.0 to 4.9 millions) after growing strongly between 2001 and 2002 (+14.7%). The Czech Republic, Germany and Poland were the main countries of origin, accounting for about 65% of total foreign tourist nights. Considering national tourism (domestic + inbound), the ratio of tourists/resident in 2003 was 2.2.

As for outbound tourism, in 2004 Slovakian tourists made almost 2 million holiday trips of 4 nights and more abroad (-0.5% in comparison to 2003). This represented about 43% of total trips made by residents. The Czech Republic, Italy and Greece were the main countries of destination, accounting for one third of total trips abroad. Comparing tourism expenditures and receipts, tourism presented a positive balance of EUR 126 million in 2004.

## 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	764	816	838	873
Number of bed places	48 723	53 856	55 326	56 296

## 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin						Monthly distribution of nights spent in collective accommodation, in 1 000			
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000										
2001	6 921	4 347	:	:	:	:	:	:	:	:	:	:
2002	7 230	4 985	:	:	:	:	:	:	:	:	:	:
2003	7 055	4 884	CZ	29.5	DE	23.6	PL	12.2	July	1 003	August	836
2004	:	:	:	:	:	:	:	:	July	838	August	749
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination						Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000			
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
2001	:	:	:	:	:	:	:	:	:	:	:	:
2002	:	:	:	:	:	:	:	:	:	:	:	:
2003	1 965	40.9	IT	11.9	CZ	11.2	EL	9.6	August	506	August	527
2004	1 955	43.4	CZ	11.2	IT	10.5	EL	8.2	July	454	July	454

## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
				total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total			
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>							%	Mio. €	Mio. €
5 220	304 529	17.1	3.2	149 725	28.7	:	2 384	3.2	0.1	2 274	1 655

## 5.2 Recent trends

Finland is mainly a generator of tourism, at home and abroad. Figures on accommodation supply revealed an up-and-down trend since the beginning of the 21st century. Both establishments and bed places diminished in 2002 (-1.8% and -0.5% respectively), recovered in 2003 (+2.2% and +1.8%) and declined again in 2004 (-3.1% and -0.1%). This resulted in an expansion of the average number of bed places per establishment (125 in 2004 against 120 in 2001).

Domestic demand accounted for about 74% of total nights in the country. In 2004 it increased by +4.6% compared to 2003 (from 11.7 to 12.3 million), after a year of stability between 2002 and 2003 and a decline in 2002 compared to 2001 (-2.7%). The number of nights spent by non-residents rose between 2001 and 2004 from 4.2 to 4.4 million, corresponding to an average annual growth rate of +1.7%.

Sweden, Germany and the United Kingdom were the top markets of origin, accounting for 33.5% of total international tourism nights, with a relatively stable market share over the last four years. Considering national tourism (domestic + inbound), the ratio of tourists/resident in 2004 was 3.2.

Regarding outbound tourism, in 2004 Finnish tourists made almost 1.9 million trips of 4 nights and more abroad (+17.5% compared to 2003). These represented just under one third of total trips made by residents (30.5% in 2004). This growth amply compensated for the decline of outbound trips recorded from 2001 to 2002 (-4.6%) and 2002 to 2003 (-1.3%).

Comparing tourism expenditures and receipts, tourism presented a negative balance of EUR 619 million in 2004.

## 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	989	971	992	961
Number of bed places	118 493	117 870	120 051	119 941

## 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin						Monthly distribution of nights spent in collective accommodation, in 1 000			
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000										
2001	12 029	4 183	SE	13.5	DE	10.7	UK	9.8	July	1 819	July	671
2002	11 703	4 291	SE	12.5	DE	10.7	UK	9.7	July	1 854	July	691
2003	11 751	4 331	SE	12.5	DE	11.2	UK	10.2	July	1 964	July	698
2004	12 293	4 406	SE	12.3	DE	11.4	UK	9.8	July	2 132p	July	737p
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination						Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000			
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
2001	1 710	29.4	ES	19.8	EL	9.4	SE	7.5	July	948	July	217
2002	1 632	27.5	ES	19.9	SE	9.3	EL	8.0	July	1 043	July	243
2003	1 610	26.6	ES	18.8	SE	8.5	EL	7.8	July	1 025	July	231
2004	1 892	30.5	ES	18.4	EL	8.1	SE	7.6	July	1 009	July	271

## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>		total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total	%	Mio. €	Mio. €
8 976	410 934	21.8	4.8	279 008	31.1	:	4 311	3.0	1.0	8 179	4 965

## 5.2 Recent trends

Sweden is mainly a generator of tourism, at home and abroad. 2004 figures for hotels and similar establishments showed a rise in both establishments and bed places (+3.9% and +2.8% respectively), following the positive trend of the previous year (+1.6% and +2.2% in 2003) and thus partly making up for the negative trend of 2002 (-12.2% and -7.2%). This resulted in an increase in the average number of bed places per hotel and similar establishments (104 in 2004 as against 98 in 2001).

Domestic demand accounted for about 77% of total nights in the country. In 2004 it fell -4.1% (from 34.3 million to 32.9 million) after several years of steady growth (+3.7% in 2003, +3.3% in 2002). On the other hand, nights spent by non-residents increased between 2001 and 2004 by 6.5%, which was almost wholly due to the

increase from 2001 to 2002. In 2004, Norway, Germany and the United Kingdom were the top markets of origin, accounting for about 38% of total international tourism nights (about 37% in 2001). Considering national tourism (domestic + inbound), the ratio of tourists/resident in 2004 was 4.8.

As for outbound tourism, in 2004 Swedish tourists made about 4.2 million trips of 4 nights and more abroad, representing 47.5% of total holiday trips made by residents. Spain, Norway and France were the main destinations, accounting for 28.5% of total holiday trips abroad.

Comparing tourism expenditures and receipts, tourism presented a negative balance of EUR 3 214 million in 2004.

## 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	1 979	1 737	1 765	1 833
Number of bed places	194 839	180 804	184 771	189 988

## 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin						Monthly distribution of nights spent in collective accommodation, in 1 000			
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000							July	July	July	July
2001	32 061	9 134	NO	13.8	DE	12.2	UK	10.9	July	7 574	July	2 418
2002	33 128	9 768	NO	17.2	DE	12.4	UK	10.4	July	8 135	July	2 625
2003	34 339	9 715	NO	18.0	DE	12.4	UK	10.1	July	8 579	July	2 629
2004	32 942	9 724	NO	15.7	DE	12.2	UK	10.4	July	8 376	July	2 725
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination						Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000			
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
									July	July	July	July
2001	:	:	:	:	:	:	:	:	July	:	July	:
2002	:	:	:	:	:	:	:	:	July	:	July	:
2003	:	:	:	:	:	:	:	:	July	:	July	:
2004	4 185	47.5	ES	14.2	NO	7.4	FR	6.9	July	1 379	July	730

## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident <sup>1</sup>	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
				total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total			
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>							%	Mio. €	Mio. €
59 673	243 820	244.7	4.2	1 715 791	28.8	:	27 929	4.4	1.3	45 582	22 728

1) 2003 data.

## 5.2 Recent trends

The United Kingdom is one of the major generators of international tourism at world level. Figures on accommodation supply showed a mixed picture at the beginning of the 21st century. There was a slight decline in the number of hotels and similar establishments each year (-0.2% from 2001 to 2002 and -1.2% from 2002 to 2003), while bed places fell sharply in 2003 (-10.6%), after a good increase in 2002 (+5.2%). This resulted in a slight reduction of the average number of bed places per establishment (from 25 in 2001 to 24 in 2003).

In 2003, domestic demand accounted for about 73% of total nights in the country. Compared to 2002 there was a decrease of 8.6% in 2003 (from 197.8 million to 180.8 million) after an increase of 0.9% from 2001 to 2002. On the other hand, nights spent by non-residents rose in 2003 (+1.8%, from 66.0 million to 67.1 million), recovering in part the downturn in 2002 (-5.5%) due to the effects of

11 September. The United States, Germany and France were the top markets of origin, accounting for 39.5% of total international tourism nights (37.2% in 2001).

Considering national tourism (domestic + inbound), the ratio of tourists/resident in 2003 was 4.2.

As for outbound tourism, in 2003 UK tourists made about 39.9 million trips of 4 nights and more abroad, representing 55.6% of total holiday trips. The recent trend showed a steady fall in outbound holidays: -1.7% from 2002 to 2003 and -3.1% from 2001 to 2002, caused by the events of 11 September. Spain, France and the USA were the main destinations, accounting for almost half of all trips abroad.

Comparing tourism expenditures and receipts, tourism presented a negative balance of EUR 22 854 million in 2004.

## 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	44 744	44 657	44 126	:
Number of bed places	1 129 503	1 188 075	1 062 126	:

## 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin						Monthly distribution of nights spent in collective accommodation, in 1 000			
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000										
2001	196 060	69 781	US	23.5	DE	8.0	FR	5.7	August	36 750	August	10 033
2002	197 810	65 959	US	24.4	DE	8.6	FR	6.2	August	34 040	July	11 024
2003	180 770	67 134	US	24.5	DE	8.7	FR	6.3	August	31 780	August	9 942
2004	:	:	:	:	:	:	:	:	August	27 510p	August	10 249p
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination						Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000			
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
2001	41 900	53.9	ES	25.5	FR	10.9	US	9.2	August	7 900	August	6 300
2002	40 600	53.5	ES	26.6	FR	11.4	US	8.1	August	6 900	August	6 400
2003	39 900	55.6	ES	27.6	FR	11.4	US	7.9	August	7 200	August	5 900
2004	:	:	:	:	:	:	:	:	:	:	:	:



## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident	GDP			Employment		Inflation rate	Tourism expenditure <sup>1</sup>	Tourism receipts <sup>1</sup>
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>		total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total	%	Mio. €	Mio. €
291	103 000	2.8	7.4	9 857	33.9	:	156	3.2	2.3	459	282

1) 2003 data.

## 5.2 Recent trends

Iceland is a small country of origin/destination of international tourism within the European market. 2004 figures on accommodation supply confirmed the positive trend which began in 2001, with an average annual growth rate of 6.9% for hotels and similar establishments (from 248 to 303) and 4.0% for bed places (from 12 632 to 15 223). The average size of establishments was stable at around 50 bed places per establishment.

Domestic tourism has shown a steady expansion since 2001. In 2004, 655 000 nights were spent by residents, accounting for about 30% of total tourism nights in the country - an increase of 7.7% in comparison to 2003. This growth followed another peak recorded in 2002 (+8%, from 559 000 in 2001 to 604 000 in 2002).

International demand has also increased strongly (+7.7% on average each year) since 2001, rising from 1.2 million to 1.5 million nights. In 2004, Germany, the United Kingdom and the United States were the main countries of origin, accounting for about 43% of total nights spent by non-residents on the island (48.0% in 2001). Considering total tourism in the country (domestic + inbound), the ratio of tourists/resident in 2004 was 7.4.

The comparison between tourism expenditures and receipts showed a negative balance of EUR 1 77 million in 2004.

### 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	248	273	283	303
Number of bed places	12 632	14 009	14 769	15 223

### 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin						Monthly distribution of nights spent in collective accommodation, in 1 000			
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000										
2001	559	1 184	DE	17.8	UK	16.4	US	13.7	July	182	July	306
2002	604	1 256	DE	16.9	UK	15.6	US	12.1	July	190	July	336
2003	608	1 377	DE	16.8	UK	15.6	US	10.7	July	178	July	362
2004	655	1 479	DE	16.5	UK	15.4	US	10.6	July	206	July	404
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination						Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000			
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
2001	:	:	:	:	:	:	:	:	:	:	:	:
2002	:	:	:	:	:	:	:	:	:	:	:	:
2003	:	:	:	:	:	:	:	:	:	:	:	:
2004	:	:	:	:	:	:	:	:	:	:	:	:

## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>		total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total	%	Mio. €	Mio. €
34	160	212.5	4.8	:	:	:	:	:	:	:	:

## 5.2 Recent trends

Liechtenstein is mainly a destination for international tourists. In 2004, the accommodation supply consisted of 45 hotels and similar establishments (47 in 2001, -1.4% on average each year) and 1 176 bed-places (1 155 in 2001, +0.6% on average each year). The increase in bed places led to a growth in the average size of an establishment (26 bed places per establishment in 2004, against 25 in 2001).

Although domestic tourism was very low (17 000 tourism nights in 2004), it showed a significant increase in the last two years (+6.2% in 2004, +14.3% in 2003). However, compared to 2001 there was a overall loss of 2 000 resident nights in 2004 (-10.5%).

International demand generated almost 90% of total nights in the country, but has been falling steadily since 2001 (-7.3% in 2002, -1.3% in 2003, -3.3% in 2004). In 2004, Germany, Switzerland and the United States were the main markets of origin, accounting for more than 65% of total international tourist flows (almost 67% in 2001). Germany alone accounted for more than one third of total nights spent by non-residents.

Considering total tourism in the country (domestic + inbound), the ratio of tourists/resident in 2004 was 4.8.

## 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	47	50	46	45
Number of bed places	1 155	1 270	1 160	1 176

## 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin						Monthly distribution of nights spent in collective accommodation, in 1 000			
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000										
2001	19	164	DE	38.3	CH	22.8	US	5.5	July	3	August	19
2002	14	152	DE	37.1	CH	26.7	US	4.2	July	2	July	20
2003	16	150	DE	32.1	CH	27.3	US	3.8	:	:	:	:
2004	17	145	DE	33.9	CH	27.7	US	4.0	July	2	August	18
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination						Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000			
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
2001	:	:	:	:	:	:	:	:	:	:	:	:
2002	:	:	:	:	:	:	:	:	:	:	:	:
2003	:	:	:	:	:	:	:	:	:	:	:	:
2004	:	:	:	:	:	:	:	:	:	:	:	:

## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>		total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total	%	Mio. €	Mio. €
4 577	323 802	14.1	5.6	201 387	44.0	:	2 273	3.2	0.6	6 732	2 377

## 5.2 Recent trends

Like the other Scandinavian countries, Norway is mainly a generator of tourism, both within the country and abroad. Figures on hotels and similar establishments revealed a decline in their number from 2001 to 2004 (-2.4% on average each year). However, the number of bed places decreased at a lower annual rate (-0.6%) between 2001 and 2004. This resulted in an increase in the average number of bed places per establishment from 124 in 2001 to almost 131 in 2004.

Domestic demand accounted for about 70% of total nights in the country. In 2004 it showed a good recovery (+5.8%, from 16.8 to 17.8 million), after a stagnation in the previous years (-0.7% from 2002 to 2003 and -0.2% from 2001 to 2002). Likewise, nights spent by non-residents rose in 2004 (+7.0%, from 6.9 to 7.4 million), after falling during the previous years (-4.4% from 2002 to 2003 and -0.6% from 2001 to 2002).

Germany, Denmark and the United Kingdom were the main markets of origin, accounting for 42.6% of total international tourism nights, with the United Kingdom passing Sweden in 2003. Considering national tourism (domestic + inbound), the ratio of tourists/resident in 2004 was 5.6.

As for outbound tourism, in 2004 Norwegian tourists made about 2.9 million trips of 4 nights and more abroad, representing about 50% of total holiday trips made by residents. Outgoing trips increased at an average rate of 7.5% each year (from 2.3 million in 2001 to 2.9 million in 2004). The main destinations were Spain, Denmark and Sweden, which together accounted for about 42% of all trips.

Comparing tourism expenditures and receipts, tourism presented a negative balance of EUR 4 355 million in 2004.

## 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	1 160	1 124	1 099	1 079
Number of bed places	143 804	143 634	143 798	141 095

## 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin						Monthly distribution of nights spent in collective accommodation, in 1 000			
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000										
2001	17 010	7 322	DE	16.9	DK	16.1	SE	12.2	July	3 246	July	2 007
2002	16 970	7 276	DE	16.3	DK	15.7	SE	11.7	July	3 251	July	1 948
2003	16 853	6 956	DE	17.7	DK	14.1	UK	11.8	July	3 277	July	1 844
2004	17 832	7 442	DE	16.1	DK	13.9	UK	12.6	July	3 418	July	1 906
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination						Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000			
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
2001	2 348	46.5	ES	20.8	DK	15.0	EL	12.2	July	851	July	574
2002	2 629	48.6	ES	18.7	DK	13.1	EL	11.9	July	792	July	616
2003	2 588	45.8	ES	17.7	DK	15.0	SE	12.5	July	812	July	656
2004	2 916	50.3	ES	19.0	DK	11.9	SE	11.0	July	850	July	618

## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
				total Mio. ?	per head 1 000 ?	tourism as % of total	total in 1 000	tourism as % of total			
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>							%	Mio. ?	Mio. ?
7 364	41 284	178.4	:	288 853	39.2	:	3 959	3.8	:	:	:

## 5.2 Recent trends

Switzerland is one of the EFTA countries and a country of origin/destination for international tourism. Figures on hotels and similar establishments for 2002 revealed a slight decline both in establishments and in bed places compared to the previous year (-1% and -0.4% respectively). This resulted in a very small increase of the average number of bed places per establishment to exactly 46 in 2002.

In 2001, domestic demand represented about 53% of total tourism nights spent in the country with 36.2 million nights as against 32.1 million generated by non-resident tourists.

Focusing on international tourism, Germany, the United Kingdom and the United States were the top markets of origin, accounting in 2002 for about 51% of total international tourism nights (about 53% in 2001), with Germany covering nearly one third of total international tourism nights.

## 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	5 701	5 643	:	:
Number of bed places	260 122	259 004	:	:

## 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin						Monthly distribution of nights spent in collective accommodation, in 1 000			
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000										
2001	36 205	32 111	DE	32.6	UK	10.3	US	9.7	July	4 142	August	4 195
2002	:	:	DE	31.2	UK	10.5	US	8.9	July	3 571	August	3 159
2003	:	:	:	:	:	:	:	:	August	1 625	August	2 212
2004	:	:	:	:	:	:	:	:	:	:	:	:
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination						Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000			
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
2001	:	:	:	:	:	:	:	:	:	:	:	:
2002	:	:	:	:	:	:	:	:	:	:	:	:
2003	:	:	:	:	:	:	:	:	:	:	:	:
2004	:	:	:	:	:	:	:	:	:	:	:	:



## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>		total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total	%	Mio. €	Mio. €
7 801	110 910	70.3	1.8	19 459	2.5	:	2 970	4.7	6.1	777	1 748

## 5.2 Recent trends

Along with Romania, Bulgaria is one of the acceding countries and an emerging tourism origin/destination. Accommodation supply recorded a boom at the beginning of the 21st century. The number of establishments increased at an average rate of 14.4% each year (from 679 in 2001 to 1 016 in 2004), while bed places increased by 13.5% (from 117 369 to 170 956 in the same period). Since the number of hotels and similar establishments grew at a faster rate than bed places, their average size decreased from 173 bed places in 2001 to 168 in 2004.

Like supply, tourism demand also grew rapidly in this period. Nights spent by residents recorded an average growth of 6.5% each year (from 3.2 million in 2001 to 3.9 million in 2004), while nights spent by international tourists in the country rose by 18.5% per year (from 6.2 million in 2001 to 10.3 million in 2004).

In 2004, foreign tourism accounted for about 73% of total tourism nights in the country (about 66% in 2001). Germany, the United Kingdom and Sweden were the top markets of origin, covering about 60% of total international tourism nights, with Sweden passing Switzerland in 2003. In particular, Germany alone accounted for about 41% of total international tourism nights.

Considering national tourism (domestic + inbound), the ratio of tourists/resident in 2004 was 1.8.

As for outbound tourism, in 2004 Bulgarian tourists made about 1.1 million trips of 4 nights and more abroad, as against 779 000 in 2001 (+11.3% on average each year). Turkey accounted for more than one quarter of all trips abroad.

Comparing tourism expenditures and receipts, tourism presented a positive balance of EUR 971 million in 2004.

## 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	679	755	849	1 016
Number of bed places	117 369	133 369	143 960	170 956

## 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin						Monthly distribution of nights spent in collective accommodation, in 1 000			
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000										
2001	3 195	6 190	DE	45.0	UK	6.3	CH	4.8	:	:	:	:
2002	3 231	7 056	DE	48.7	UK	9.5	CH	3.4	August	477	August	1 701
2003	3 379	9 143	DE	45.8	UK	11.5	SE	4.4	August	520	August	2 384
2004	3 857	10 303	DE	41.1	UK	14.7	SE	4.5	:	:	:	:
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination						Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000			
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
2001	779	:	:	:	:	:	:	:	:	:	July	91
2002	835	:	TR	15.3	DE	9.1	EL	6.2	:	:	August	105
2003	903	:	TR	15.5	DE	10.4	IT	6.0	:	:	August	106
2004	1 074	:	TR	26.8	EL	8.3	DE	7.9	:	:	August	126

## 5.1 People and the economy in 2004

Population1	Surface	Population density	Tourists/ resident	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
in 1 000	in km2	inhabitants/km2		total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total	%	Mio. €	Mio. €
4 442	56 594	78.5	:	27 623	6.2	:	1 583	5.5	:	:	:

1) 2003 data.

## 5.2 Recent trends

Croatia is basically a destination for international tourism. 2003 figures on hotel supply showed a boom in the number of establishments (+9.5% on average each year) and a slight increase in bed places (+1.5%). As a consequence, the average number of bed places per establishment fell from 271 in 2001 to 233 in 2003.

Like supply, demand also grew significantly between 2001 and 2003. Nights spent by residents increased by 5.0% from 2002 to 2003, recovering the decline recorded between 2001 and 2002 (-2.3%).

During the same period, nights spent by non-residents - which accounted for about 88% of total nights in the country in 2003 - showed a steady growth: +2.3% from 2002 to 2003 (30.3 to 31.0 million) and +1.8% from 2001 to 2002.

Germany, Italy and Austria were the main countries of origin, accounting for more than half of total international tourism nights. Germany alone covered 28.5% of the total.

### 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	694	788	832	:
Number of bed places	187 749	187 947	193 538	:

### 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin					Monthly distribution of nights spent in collective accommodation, in 1 000				
	by residents	by non-residents										
	in 1 000	in 1 000	1st market	2nd market	3rd market	by residents		by non-residents				
2001	4 156	29 759	:	:	:	:	:	:	:	:	:	:
2002	4 061	30 287	:	:	:	:	:	:	:	:	:	:
2003	4 263	30 983	DE	28.5	IT	12.5	AT	9.7	August	832	August	9 506
2004	:	:	:	:	:	:	:	:	:	:	:	:
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination					Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000				
	in 1 000	as % of total trips										
	in 1 000	as % of total trips	1st market	2nd market	3rd market	in the country		abroad				
2001	:	:	:	:	:	:	:	:	:	:	:	:
2002	:	:	:	:	:	:	:	:	:	:	:	:
2003	:	:	:	:	:	:	:	:	:	:	:	:
2004	:	:	:	:	:	:	:	:	:	:	:	:

## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>		total Mio. €	per head 1 000 €	tourism as % of total	total in 1 000	tourism as % of total	%	Mio. €	Mio. €
21 711	238 391	91.1	:	58 947	2.7	:	9 283	1.5	11.9	456	406

## 5.2 Recent trends

Romania is an emerging destination/origin of tourism, both in the country and abroad. In 2001, hotel accommodation supply amounted to 2 681 establishments and 199 320 bed places. This makes an average of 74 bed places per hotel

Regarding demand, in 2001 domestic tourists spent 15.7 million nights in the country. This represented about 87% of total tourism nights.

The comparison between tourism expenditure and receipts showed a negative balance of EUR 50 million for 2004.

### 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	2 681	:	:	:
Number of bed places	199 320	:	:	:

### 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin					Monthly distribution of nights spent in collective accommodation, in 1 000				
	by residents	by non-residents										
	in 1 000	in 1 000	1st market	2nd market	3rd market	by residents	by non-residents					
2001	15 731	2 391	:	:	:	:	:	:	:	:	:	:
2002	:	:	:	:	:	:	:	:	:	:	:	:
2003	:	:	:	:	:	:	:	:	:	:	:	:
2004	:	:	:	:	:	:	:	:	:	:	:	:
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination					Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000				
	in 1 000	as % of total trips										
	in 1 000	as % of total trips	1st market	2nd market	3rd market	in the country	abroad					
2001	:	:	:	:	:	:	:	:	:	:	:	:
2002	:	:	:	:	:	:	:	:	:	:	:	:
2003	:	:	:	:	:	:	:	:	:	:	:	:
2004	:	:	:	:	:	:	:	:	:	:	:	:

## 5.1 People and the economy in 2004

Population	Surface	Population density	Tourists/ resident	GDP			Employment		Inflation rate	Tourism expenditure	Tourism receipts
				total Mio. ₺	per head 1 000 ₺	tourism as % of total	total in 1 000	tourism as % of total			
in 1 000	in km <sup>2</sup>	inhabitants/km <sup>2</sup>							%	Mio. ₺	Mio. ₺
71 254e	769 604	92.6	:	239 895f	3.4	:	:	:	:	2 033	12 855

## 5.2 Recent trends

Turkey is mainly a destination for international tourism. In 2001, hotel accommodation supply comprised 1 989 establishments and 366 605 bed places. This is an average of 184 bed places per establishment and suggests that it is mainly enterprises or hotel chains that are active on the supply market, offering travel packages for the international market. This assumption is confirmed by the fact that figures for tourism expenditure and receipts have shown a positive balance for many years, with a peak of EUR 10 822 million in 2004.

### 5.3 Key figures: tourism supply

	2001	2002	2003	2004
Number of establishments	1 989	:	:	:
Number of bed places	366 605	:	:	:

### 5.4 Key figures: tourism demand

	Nights spent in collective accommodation		Nights spent by non-residents (in %) by main countries of origin						Monthly distribution of nights spent in collective accommodation, in 1 000			
	by residents	by non-residents	1st market		2nd market		3rd market		by residents		by non-residents	
	in 1 000	in 1 000										
2001	:	:	DK	42.2	SE	6.6	ES	6.2	:	:	:	:
2002	:	:	:	:	:	:	:	:	:	:	:	:
2003	:	:	:	:	:	:	:	:	:	:	:	:
2004	:	:	:	:	:	:	:	:	:	:	:	:
	4+ night holiday trips by resident tourists abroad spent in collective accommodation		Holiday trips abroad (in %) by main countries of destination						Monthly distribution of 4+ night holiday trips by resident tourists, in 1 000			
	in 1 000	as % of total trips	1st market		2nd market		3rd market		in the country		abroad	
2001	:	:	:	:	:	:	:	:	:	:	:	:
2002	:	:	:	:	:	:	:	:	:	:	:	:
2003	:	:	:	:	:	:	:	:	:	:	:	:
2004	:	:	:	:	:	:	:	:	:	:	:	:





## Annex - Technical Notes

## A. General Information on tourism statistics

### Tourism statistics – sources and recent developments

In 1995, Council Directive 95/57/EC on the collection of statistical information in the field of tourism provided all Member States with a set of guidelines for the collection, compilation, processing and transmission of harmonised Community statistical information on tourism demand and supply. The aim was to establish a common information system on tourism statistics at Community level. After that, a "Community Methodology on Tourism Statistics" was elaborated with the help of Member States, following Council Decision 90/655/EEC, and was published in 1998. It set out the basic methodology for tourism supply and demand, tourism market segments (rural and regional aspects of tourism, cultural tourism), statistics relating to tourism (tourism expenditure and balance of payments, tourism costs, prices and tariffs, employment in tourism) and tourism and the environment.

The Community methodology is used as a benchmark for tourism statistics and concepts, in order to produce harmonised basic tourism statistics and provide a common basis for all kinds of possible applications and tools for tourism analysis.

In recent years, there have been new developments within tourism itself and in tourism methodology in Europe and in the world, which have made it necessary to update the concepts and methodological framework.

At the same time, Tourism Satellite Accounts (TSA) have been introduced as a new tool for measuring the economic impact of tourism. In 2001, a "Tourist Satellite Account: Recommended Methodological Framework" was published jointly by the Commission of the European Communities, the Organization for Economic Co-operation and Development (OECD), the United Nations (UN) and the World Tourism Organization (WTO). These recommendations are based on a common conceptual framework for the design of the TSA that was established by an inter-secretariat working group.

At EU level, this has prompted a revision of the EC Directive and of the Community Methodology, which is currently under discussion. The revision concerns supply-side and demand-side data and will take into account Eurostat's six quality components: relevance, accuracy, timeliness and punctuality, accessibility and clarity, comparability, and coherence.

At world level, the World Tourism Organisation (a UN agency set up a few years ago), is the leading institution for the collection and dissemination of comparable tourism-related statistics. The Organisation has developed a Statistical Programme that integrates the major lines of action common to other sister organisations within the UN system of international statistics, with specific projects in the field of tourism. Attention is focused on promoting the implementation of international standards and TSA at a global level and adapting the TSA conceptual framework.

### **Key drivers for the evolution of tourism and their relevance for statistics**

Looking at the developments that have recently impacted on tourism statistics and definitions, they have been stimulated by the evolution of international tourism demand, in terms of both market size and characteristics. This evolution requires new concepts and tools to be developed in order to improve data generation and collection.

Various factors have shaped international tourism development in Europe in the last three to four years and their effects also have relevance from the statistical point of view. First of all, the enlargement of the European Union to 25 countries in 2004 has given a new impetus to international tourism to and from these areas. The accession negotiations currently under way with four countries (Bulgaria, Croatia, Romania and Turkey) will further fuel this trend.

These events contribute to increasing cross-border trade and co-operation between new and old Member States and then the development of intraregional tourism. That poses new problems for the development of a common European information system on tourism statistics.

Another aspect to take into account is the regional "diversification", which has characterised both old and new Member states (e.g. Italy, Portugal, Greece, Czech Republic, etc.), with the transfer of power from central to local governments, including in the tourism sector. On the one hand, decentralisation has allowed regions to develop their own tourism plans and, on the other hand, it has also increased the fragmentation of roles and duties and led to a lack of co-ordination in key areas like communication, marketing and promotion. In countries where devolution is at an early stage of development, it has also caused some delays in data collection and transmission from local bodies to central governments and statistical institutions.

A third issue is the emergence of new holiday patterns entailing the need to have more information on specific market segments (e.g. business tourism, congress tourism, tourism in private accommodation, etc.) for economic and marketing purposes. A number of methodological projects have been planned at European level, which also involve the development of technical manuals on statistics.

## B. Terms and definitions

### General and statistical terms and definitions

**Annual average growth rate:** The year-over-year growth rate of a phenomenon over a specified period. It is an imaginary number that describes the rate at which a phenomenon has grown as though it had grown at a steady state (in %).

**Consumer price index:** Measures changes over time in the general level of prices of goods and services that a reference population acquires, uses or pays for consumption.

**Employment (total):** Covers both employees and self-employed persons aged over 15 years, who are engaged in some productive activity that falls within the production boundary of the system.

**Enterprise:** An enterprise is defined as the smallest combination of legal units that is an organizational unit producing goods or services, which benefits from a certain degree of autonomy in decision-making, especially for the allocation of its current resources. An enterprise carries out one or more activities at one or more locations.

**Exports:** Exports of goods and services consist of transactions in goods and services (sales, barter, gifts or grants) from residents to non-residents.

**Gross domestic product:** Final result of the production activity of resident producer units.

**Imports:** Imports of goods and services consist of transactions in goods and services (purchases, barter, gifts or grants) from non-residents to residents.

### Tourism specific terms and definitions

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

**Arrivals of residents and non-residents:** An arrival (departure) is defined as a person who arrives (leaves) at a collective accommodation establishment or at a private tourism accommodation and checks in (out).

Statistically there is not much difference if, instead of arrivals, departures are counted. No age limit is applied: children are counted as well as adults, even in the case when the overnight stays of children might be free of charge. Arrivals are registered by country of residence of the guest and by month. The arrivals of non-tourists (e.g. refugees) should be excluded, if possible. The arrivals of same-day visitors spending only 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.

**Average hotel size:** Average accommodation capacity of the hotel supply in a country in terms of average number of bed places per hotel. It is derived comparing the global overnight capacity (number of bed places) of hotels and similar establishments to the number of establishments of the same category.

**Business trip:** It is recommended to use the term "trip" to describe tourism from the standpoint of the generating place or country (the origin). Business trip covers the whole period that the person engages in tourism but for professional purposes.

**Collective tourist accommodation establishment:** An accommodation establishment that provides overnight lodging for the traveller in a room or some other unit, but 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 a common commercial-type management, even if it is non-profit-making. Include 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.

**Holiday trip:** It is recommended to use the term "trip" to describe tourism from the standpoint of the generating place or country (the origin). Holiday trip covers the whole period that the person engages in tourism for leisure purposes.

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

**International tourism:** Consists of inbound tourism and outbound tourism.

**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 (his/her physical presence there being unnecessary) in a collective accommodation establishment or in private tourism accommodation.

Overnight stays are calculated 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 accommodations at the same time. The overnight stays of 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 set up in the establishment (dwelling), ignoring any extra beds that may be set up by customer request. The term bed place applies to a single bed, double bed being counted as two bed places. The unit serves to measure the capacity of any type of accommodation. A bed place is also a place on a pitch or in a boat on a mooring to accommodate one person. One camping pitch should equal four bed places if the actual number of bed places is not known.

**Number of establishments:** The local unit is an enterprise or part thereof situated in a geographically identified place. At or from this place economic activity is carried out for which - save for certain exceptions - one or more persons work (even if only part-time) for one and the same enterprise. The accommodation establishment conforms to the definition of local unit as the production unit. This is irrespective of whether the 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 major part of turnover may come from restaurant or other services.

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

**Ratio tourists/resident:** This indicator compares the number of tourists (in terms of overnight stays) to the number of residents that are present in a destination in the same time period (e.g. a day, a month, a year). It measures the intensity of tourism demand in that period and is one of the indicators used to measure the carrying capacity of a tourist destination. It is a factor representing the number of nights spent in a country divided by the inhabitants of the same country.

**Tourism balance:** Difference between international tourism receipts and expenditures. In countries that are basically destinations of international tourism the difference is usually positive (i.e. receipts overcome expenditures). This means that the economy gains from tourism. On the contrary, countries that are

mainly generators of international tourism generally show a negative balance (i.e. expenditures overcome receipts). This means that their economy loses from tourism, because expenses made by residents abroad are higher than those made by international tourists in the country.

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

**Tourism receipt:** Expenditures of international inbound tourists including their payments to international carriers for international transport.

**Tourism Satellite Accounts (TSA):** Statistical accounting framework in the field of tourism that measures the goods and services according to international standards and concepts. They provide macroeconomic aggregates to describe the size and the economic importance of tourism value added and tourism gross domestic product. They have been created following the recommendations of the 1993 System of National Accounts in order to include tourism in the economic system.

## C. Signs and abbreviations

### Signs:

:	.....	.not available
b	.....	.break in series
:c	.....	.confidential data
e	.....	.country estimate
f	.....	.forecast
p	.....	.provisional data
s	.....	.Eurostat estimate
mio	.....	.million

### Country abbreviations:

EU-25	.....	.European Union of 25 countries
BE	.....	.Belgium
CZ	.....	.Czech Republic
DK	.....	.Denmark
DE	.....	.Germany

EE	.....	.Estonia
EL	.....	.Greece
ES	.....	.Spain
FR	.....	.France
IE	.....	.Ireland
IT	.....	.Italy
CY	.....	.Cyprus
LV	.....	.Latvia
LT	.....	.Lithuania
LU	.....	.Luxembourg
HU	.....	.Hungary
MT	.....	.Malta
NL	.....	.Netherlands
AT	.....	.Austria
PL	.....	.Poland
PT	.....	.Portugal
SI	.....	.Slovenia

SK	.....	.Slovakia
FI	.....	.Finland
SE	.....	.Sweden
UK	.....	.United Kingdom
IS	.....	.Iceland
LI	.....	.Liechtenstein
NO	.....	.Norway
CH	.....	.Switzerland
BG	.....	.Bulgaria
HR	.....	.Croatia
RO	.....	.Romania
TR	.....	.Turkey

### Organizations:

- DG ENTR** . . . . . Directorate General for Enterprise and Industry (EU)
- OECD** . . . . . Organization for Economic Co-operation and Development
- UN** . . . . . United Nations
- WTO** . . . . . World Tourism Organization

### Technical abbreviations:

- GDP** . . . . . Gross domestic product
- EIM** . . . . . European Implementation Manual on Tourism Satellite Accounts
- Nace Rev.1** . . . . . Statistical Classification of Economic Activities in the European Community, Rev. 1
- TSA** . . . . . Tourism Satellite Accounts



## D. Classifications

### Nace Rev.1 classification (parts relevant to tourism)

Section H		Hotels and restaurants
55		Hotels and restaurants
	55.1	Hotels
		55.10 Hotels
	55.2	Camping sites and other provision of short-stay accommodation
		55.21 Youth hostels and mountain refuges
		55.22 Camping sites, including caravan sites
		55.23 Other provision of lodgings n.e.c.
	55.3	Restaurants
		55.30 Restaurants
	55.4	Bars
		55.40 Bars
	55.5	Canteens and catering
		55.51 Canteens
		55.52 Catering
Section I		Transport, storage and communication
	63.3	Activities of travel agencies and tour operators; tourist assistance activities n.e.c.
		63.30 Activities of travel agencies and tour operators; tourist assistance activities n.e.c.

## E. Data sources

Date of data extraction: 9 September 2005

Name	Web address	Sources used
Eurostat	<a href="http://www.europa.eu.int/comm/dgs/eurostat/index_en.htm">http://www.europa.eu.int/comm/dgs/eurostat/index_en.htm</a>	Free dissemination database; Tourism – production database; Balance of payment database; National accounts database

Country	Web address	Source name
Belgium	<a href="http://www.statbel.fgov.be">http://www.statbel.fgov.be</a>	National Instituut voor de Statistiek / Institut National de Statistique (Statistics Belgium)
Czech Republic	<a href="http://www.czso.cz">http://www.czso.cz</a>	Czech Statistical Office
Denmark	<a href="http://www.dst.dk">http://www.dst.dk</a>	Danmarks Statistics (Statistics Denmark)
Germany	<a href="http://www.destatis.de">http://www.destatis.de</a>	Statistisches Bundesamt (Federal Statistical Office)
Estonia	<a href="http://www.stat.ee">http://www.stat.ee</a>	Statistikaamet (Statistical Office of Estonia)
Greece	<a href="http://www.statistics.gr">http://www.statistics.gr</a>	National Statistical Service of Greece
Spain	<a href="http://www.ine.es">http://www.ine.es</a>	Instituto Nacional de Estadística (INE)
France	<a href="http://www.insee.fr">http://www.insee.fr</a>	Institut National de Statistique et des Etudes Economiques (National Institute for Statistics and Economic Studies)
Ireland	<a href="http://www.cso.ie">http://www.cso.ie</a>	Central Statistics Office
Italy	<a href="http://www.istat.it">http://www.istat.it</a>	Istituto nazionale di statistica (National Institute of Statistics)
Cyprus	<a href="http://www.mof.gov.cy/mof/cystat/statistics.nsf">http://www.mof.gov.cy/mof/cystat/statistics.nsf</a>	Statistical Service of the Republic of Cyprus
Latvia	<a href="http://www.csb.lv">http://www.csb.lv</a>	Central Statistical Bureau of Latvia
Lithuania	<a href="http://www.std.lt">http://www.std.lt</a>	Statistics Lithuania

Country	Web address	Source name
Luxembourg	<a href="http://www.statec.lu">http://www.statec.lu</a>	Service Central de la Statistique et des Etudes Economiques
Hungary	<a href="http://www.ksh.hu">http://www.ksh.hu</a>	Központi Statisztika Hivatal (Hungarian Central Statistical Office)
Malta	<a href="http://www.nso.gov.mt">http://www.nso.gov.mt</a>	National Statistics Office
Netherlands	<a href="http://www.cbs.nl">http://www.cbs.nl</a>	Centraal Bureau voor de Statistiek (Statistics Netherlands)
Austria	<a href="http://www.statistik.at">http://www.statistik.at</a>	Statistik Austria
Poland	<a href="http://www.stat.gov.pl">http://www.stat.gov.pl</a>	Central Statistical Office (GUS)
Portugal	<a href="http://www.ine.pt">http://www.ine.pt</a>	Instituto Nacional de Estatística (INE)
Slovenia	<a href="http://www.stat.si">http://www.stat.si</a>	Statistical Office of the Republic of Slovenia
Slovakia	<a href="http://www.statistics.si">http://www.statistics.si</a>	Statistický úrad Slovenskej republiky (Statistical Office of the Slovak Republic)
Finland	<a href="http://www.stat.fi">http://www.stat.fi</a>	Tilastokeskus (Statistics Finland)
Sweden	<a href="http://www.scb.se">http://www.scb.se</a>	Statistiska centralbyrån (Statistics Sweden)
United Kingdom	<a href="http://www.statistics.gov.uk">http://www.statistics.gov.uk</a>	Office for National Statistics
Iceland	<a href="http://www.statice.is">http://www.statice.is</a>	Hagstofa Islands (Statistics Iceland)
Liechtenstein	<a href="http://www.llv.li/amtstellen/llv-avw-statistik.htm">http://www.llv.li/amtstellen/llv-avw-statistik.htm</a> www.	Office of Economic Affairs – Bureau of Statistics
Norway	<a href="http://www.ssb.no">http://www.ssb.no</a>	Statistisk sentralbyrå (Statistics Norway)
Switzerland	<a href="http://www.statistik.admin.ch">http://www.statistik.admin.ch</a>	Bundesamt für Statistik
Bulgaria	<a href="http://www.nsi.bg">http://www.nsi.bg</a>	National Statistical Institute
Croatia	<a href="http://www.dzs.hr">http://www.dzs.hr</a>	Croatian Bureau of Statistics (CROSTAT)
Romania	<a href="http://www.insse.ro">http://www.insse.ro</a>	Institutul National de Statistica (National Institute of Statistics)
Turkey	<a href="http://www.die.gov.tr">http://www.die.gov.tr</a>	State Institute of Statistics