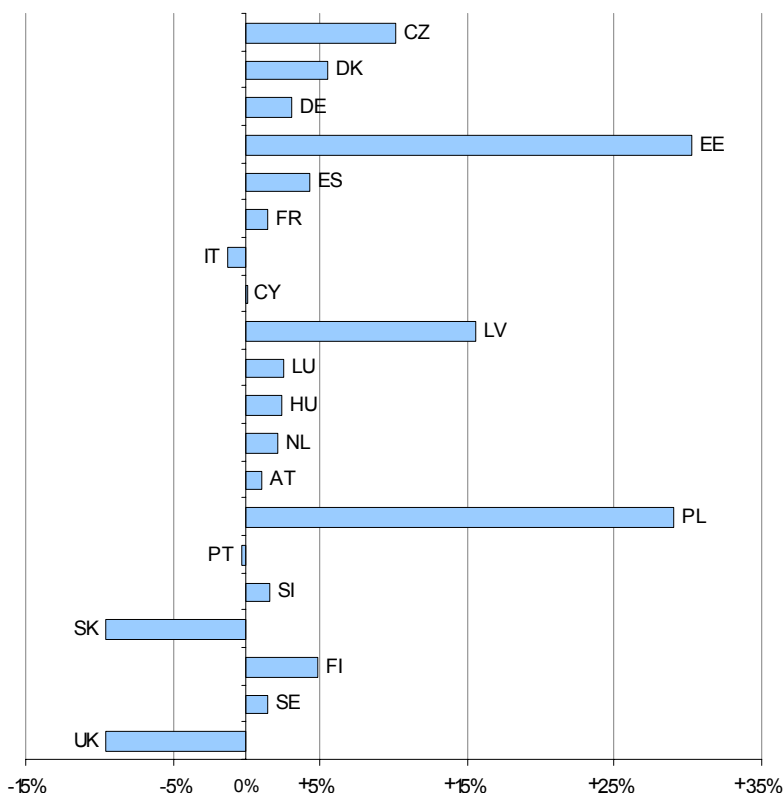


# Tourism in the enlarged European Union

Figure 1: % change in total nights<sup>1</sup> in hotels and similar establishments in EU<sup>2</sup> countries for the period January-September, 2004 compared to 2003



1) Residents and non-residents. 2) data not available for: B, EL, IE and MT.

## Statistics in focus

INDUSTRY, TRADE  
AND SERVICES  
POPULATION AND  
SOCIAL CONDITIONS

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## Main features

- The first figures for the months January to September 2004 show tourism picking up in the European Union – in terms of guest flows in hotels and similar establishments – after a rather stagnant year in 2003. Many of the new Member States saw a big jump in their figures compared to the previous year. Growth in the old Member States was more modest.
- Tourism in the European Union is essentially driven by the demand of its citizens. In some countries domestic tourism demand is the driving force, and in others the tourism industry is heavily geared to inbound tourism. Domestic tourism in Germany generates one fifth of all resident nights in the EU25. Inbound tourism to Spain makes up one quarter of all non-resident nights in the EU25. European wide high performance transport networks and the Euro favour the growth of intra-EU tourism. Intra-EU25 tourist flows make up three-quarters of all nights spent by non-residents in hotels and similar establishments.
- The volume of tourist nights in Italy, Spain, France, Germany and the United Kingdom make up nearly three-quarters of all nights spent in collective accommodation in the European Union. The 10 new member states account for about 7% of total tourist nights spent in the European Union.



## Seasonal trends 2004

*Table 1: Nights spent in hotels and similar establishments (figures in thousands)*

	2004									Jan-Sep 2003 <sup>2</sup>	Jan-Sep 2004	Var. %
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep			
<b>EU-25<sup>1</sup></b>	<b>74 311</b>	<b>84 282</b>	<b>94 381</b>	<b>103 212</b>	<b>120 955</b>	<b>135 998</b>	<b>164 915</b>	<b>184 661</b>	<b>143 832</b>	<b>1 100 313</b>	<b>1 106 548</b>	<b>0.6</b>
<b>BE</b>	748	933	1 061	1 266	1 374	1 245	:	:	:	10 882	:	:
<b>CZ</b>	1 655	1 912	2 094	2 022	2 373	2 315	2 676	2 882	2 429	18 494	20 359	10.1
<b>DK</b>	452	500	641	663	872	1 000	1 409	1 165	912	7 214	7 614	5.5
<b>DE</b>	10 625	11 905	13 635	14 981	19 325	18 671	19 692	20 834	21 276	146 434	150 944	3.1
<b>EE</b>	150	168	211	243	293	340	482	393	279	1 965	2 558	30.2
<b>EL</b>	:	:	:	:	:	:	:	:	:	:	:	:
<b>ES</b>	10 379	12 224	14 707	17 512	20 620	23 837	29 122	34 642	26 958	182 192	190 002	4.3
<b>FR</b>	11 089	12 354	13 785	15 490	17 325	18 071	20 573	22 288	18 511	147 351	149 485	1.4
<b>IE</b>	:	:	:	:	:	:	:	:	:	:	:	:
<b>IT</b>	11 071	12 528	13 790	15 855	18 703	25 603	33 009	37 513	23 723	194 180	191 795	-1.2
<b>CY</b>	417	522	680	974	1 478	1 587	1 982	2 194	1 701	11 530	11 535	0.0
<b>LV</b>	97	103	110	126	159	193	259	246	165	1 263	1 458	15.5
<b>LT</b>	69	74	92	101	144	182	228	233	166	:	1 289	:
<b>LU</b>	68	71	92	105	130	119	126	128	124	939	963	2.5
<b>HU</b>	636	664	952	1 131	1 352	1 362	1 732	1 962	1 424	10 951	11 216	2.4
<b>MT</b>	:	:	:	:	:	:	:	:	:	:	:	:
<b>NL</b>	1 517	1 747	1 954	2 616	2 744	2 492	2 744	3 221	2 720	21 297	21 754	2.1
<b>AT</b>	7 909	9 279	7 271	4 586	4 340	5 736	7 592	9 394	6 289	61 799	62 396	1.0
<b>PL</b>	1 065	1 138	1 273	1 312	1 728	1 827	1 966	2 037	1 871	11 015	14 215	29.0
<b>PT</b>	1 563	1 925	2 373	2 890	3 106	3 351	3 789	4 886	3 683	27 640	27 566	-0.3
<b>SI</b>	329	335	333	375	442	477	538	640	512	3 920	3 981	1.6
<b>SK</b>	460	558	488	439	570	627	737	795	635	5 865	5 308	-9.5
<b>FI</b>	908	1 070	1 188	1 002	965	1 355	1 834	1 411	1 162	10 394	10 894	4.8
<b>SE</b>	1 228	1 461	1 755	1 530	1 806	1 943	2 825	2 319	1 935	16 555	16 801	1.5
<b>UK</b>	9 777	10 271	12 422	13 252	13 204	13 876	18 829	20 007	15 485	140 498	127 123	-9.5

1) Including 2003 data for BE (jul-sep) and 2002 data for EL, IE and MT (only for non-residents).

2) Including 2004 data for LT and 2002 data for EL, IE and MT (only for non-residents).

Following a slight dip between 2001 and 2003, the figures for 2004 seem to indicate a revival in tourism demand, despite still wavering consumer confidence and, for the central and north European countries, a wet summer in 2004.

Table 1 presents seasonal tourist flows for the period January to September 2004 in terms of nights spent in hotels and similar establishments. Estonia (+30%), Poland (+29%), Latvia (+16%) and the Czech Republic (+10%) experienced the highest growth rates compared to the same period in 2003. In the cases of Estonia and Poland the monthly figures for

2004 compared to 2003 were substantially higher, with an increase of more than 10% for every month. In the old Member States the highest growths were recorded in Denmark (+6%), Finland (+5%) and Spain (+4%). Of all the EU25 countries, three recorded decreases: Italy (-1%), Slovakia (-10%) and the United Kingdom (-10%).

For the vast majority of the EU25 countries the busiest month is August - in terms of total nights spent in hotels and similar establishments - but in the Nordic countries i.e. Denmark, Estonia, Latvia, Finland and Sweden, the busiest month is July.

## The volume of guest flows in 2003

Table 2 presents the volume of guest flows in the European Union in 2003. Total nights spent in collective accommodation peaked at over 2 billion in 2000, and although the figures for the next three years were slightly lower they are still above the 2 billion mark.

Obviously the largest countries report the biggest volumes. Tourist nights in Italy and Spain each account for 16% of all nights spent in all collective

accommodation in the EU; France and Germany for 14% each, and the United Kingdom for 13%. Looking at the domestic tourism market - i.e. nights spent in all collective accommodation in the EU by residents only - German (20%), Italian (17%), and British residents generate the largest volumes. Concerning inbound tourism Spain (25%), Italy (16%) and France (12%) host the biggest volume of non-residents in terms of nights spent in all collective accommodation in the EU.

**Table 2: Nights spent by residents and non-residents in hotels and similar establishments and in other collective accommodation establishments, 2003 (figures in thousands)**

	Total collective accommodation establishments			Hotels and similar establishments			Other collective accommodation establishments		
	Resident nights	Non-resident nights	Total	Resident nights	Non-resident nights	Total	Resident nights	Non-resident nights	Total
<b>EU-25<sup>1</sup></b>	<b>1 232 695</b>	<b>856 225</b>	<b>2 088 919</b>	<b>755 069</b>	<b>609 646</b>	<b>1 364 715</b>	<b>477 625</b>	<b>246 579</b>	<b>724 205</b>
<b>BE</b>	<i>13 089</i>	<i>15 929</i>	<i>29 019</i>	<i>4 061</i>	<i>10 281</i>	<i>14 341</i>	<i>9 028</i>	<i>5 649</i>	<i>14 677</i>
<b>CZ</b>	<i>22 833</i>	<i>16 511</i>	<i>39 343</i>	<i>9 779</i>	<i>13 688</i>	<i>23 467</i>	<i>13 054</i>	<i>2 823</i>	<i>15 876</i>
<b>DK</b>	<i>16 489</i>	<i>9 859</i>	<i>26 348</i>	<i>4 631</i>	<i>4 507</i>	<i>9 138</i>	<i>11 859</i>	<i>5 352</i>	<i>17 210</i>
<b>DE</b>	<i>251 388</i>	<i>41 578</i>	<i>292 965</i>	<i>156 240</i>	<i>33 301</i>	<i>189 541</i>	<i>95 148</i>	<i>8 276</i>	<i>103 424</i>
<b>EE</b>	<i>817</i>	<i>2 268</i>	<i>3 084</i>	<i>558</i>	<i>2 086</i>	<i>2 644</i>	<i>259</i>	<i>182</i>	<i>441</i>
<b>EL<sup>2</sup></b>	<i>13 131</i>	<i>39 119</i>	<i>52 250</i>	<i>12 753</i>	<i>38 522</i>	<i>51 274</i>	<i>378</i>	<i>597</i>	<i>975</i>
<b>ES</b>	<i>124 689</i>	<i>217 851</i>	<i>342 541</i>	<i>91 295</i>	<i>136 865</i>	<i>228 161</i>	<i>33 394</i>	<i>80 986</i>	<i>114 380</i>
<b>FR</b>	<i>179 352</i>	<i>103 745</i>	<i>283 097</i>	<i>115 536</i>	<i>69 323</i>	<i>184 859</i>	<i>63 816</i>	<i>34 421</i>	<i>98 238</i>
<b>IE<sup>2</sup></b>	<i>11 653</i>	<i>19 957</i>	<i>31 610</i>	<i>7 395</i>	<i>17 321</i>	<i>24 716</i>	<i>4 258</i>	<i>2 636</i>	<i>6 894</i>
<b>IT</b>	<i>204 350</i>	<i>138 941</i>	<i>343 291</i>	<i>135 010</i>	<i>93 599</i>	<i>228 609</i>	<i>69 340</i>	<i>45 342</i>	<i>114 682</i>
<b>CY</b>	<i>968</i>	<i>13 490</i>	<i>14 458</i>	<i>957</i>	<i>13 424</i>	<i>14 381</i>	<i>11</i>	<i>66</i>	<i>77</i>
<b>LV</b>	<i>825</i>	<i>983</i>	<i>1 807</i>	<i>669</i>	<i>963</i>	<i>1 632</i>	<i>155</i>	<i>20</i>	<i>175</i>
<b>LT</b>	<i>824</i>	<i>836</i>	<i>1 660</i>	<i>342</i>	<i>766</i>	<i>1 108</i>	<i>483</i>	<i>69</i>	<i>552</i>
<b>LU</b>	<i>219</i>	<i>2 517</i>	<i>2 736</i>	<i>80</i>	<i>1 144</i>	<i>1 224</i>	<i>139</i>	<i>1 373</i>	<i>1 512</i>
<b>HU</b>	<i>8 571</i>	<i>10 040</i>	<i>18 611</i>	<i>5 824</i>	<i>8 046</i>	<i>13 870</i>	<i>2 747</i>	<i>1 994</i>	<i>4 741</i>
<b>MT</b>	<i>:</i>	<i>:</i>	<i>:</i>	<i>:</i>	<i>:</i>	<i>:</i>	<i>:</i>	<i>:</i>	<i>:</i>
<b>NL<sup>2</sup></b>	<i>56 004</i>	<i>26 368</i>	<i>82 372</i>	<i>13 593</i>	<i>14 922</i>	<i>28 515</i>	<i>42 411</i>	<i>11 446</i>	<i>53 857</i>
<b>AT</b>	<i>27 023</i>	<i>68 217</i>	<i>95 240</i>	<i>18 667</i>	<i>55 200</i>	<i>73 868</i>	<i>8 355</i>	<i>13 017</i>	<i>21 372</i>
<b>PL</b>	<i>37 520</i>	<i>7 828</i>	<i>45 348</i>	<i>8 813</i>	<i>5 450</i>	<i>14 263</i>	<i>28 707</i>	<i>2 378</i>	<i>31 084</i>
<b>PT</b>	<i>16 713</i>	<i>24 870</i>	<i>41 583</i>	<i>10 661</i>	<i>23 215</i>	<i>33 875</i>	<i>6 053</i>	<i>1 655</i>	<i>7 708</i>
<b>SI</b>	<i>3 203</i>	<i>3 995</i>	<i>7 198</i>	<i>1 725</i>	<i>3 166</i>	<i>4 891</i>	<i>1 478</i>	<i>830</i>	<i>2 308</i>
<b>SK</b>	<i>7 055</i>	<i>4 884</i>	<i>11 939</i>	<i>3 796</i>	<i>3 560</i>	<i>7 356</i>	<i>3 259</i>	<i>1 324</i>	<i>4 583</i>
<b>FI</b>	<i>11 751</i>	<i>4 331</i>	<i>16 082</i>	<i>9 671</i>	<i>3 758</i>	<i>13 429</i>	<i>2 080</i>	<i>573</i>	<i>2 653</i>
<b>SE</b>	<i>34 339</i>	<i>9 715</i>	<i>44 054</i>	<i>16 235</i>	<i>4 833</i>	<i>21 068</i>	<i>18 104</i>	<i>4 882</i>	<i>22 986</i>
<b>UK</b>	<i>189 890</i>	<i>72 394</i>	<i>262 284</i>	<i>126 780</i>	<i>51 704</i>	<i>178 484</i>	<i>63 110</i>	<i>20 690</i>	<i>83 800</i>

*Italics = provisional; 1) excluding MT; 2) 2002 data.*

## Predominance of domestic and inbound tourism markets

**Table 3: Origin of tourists - the proportion of nights spent by residents and non-residents, 2003 (%)**

%	All Collective accommodation establishments		Hotels and similar establishments		Other collective accommodation establishments	
	Resident nights	Non-resident nights	Resident nights	Non-resident nights	Resident nights	Non-resident nights
<b>EU-25</b>	<b>59</b>	<b>41</b>	<b>55</b>	<b>45</b>	<b>66</b>	<b>34</b>
<b>BE</b>	<i>45</i>	<i>55</i>	<i>28</i>	<i>72</i>	<i>62</i>	<i>38</i>
<b>CZ</b>	<i>58</i>	<i>42</i>	<i>42</i>	<i>58</i>	<i>82</i>	<i>18</i>
<b>DK</b>	<i>63</i>	<i>37</i>	<i>51</i>	<i>49</i>	<i>69</i>	<i>31</i>
<b>DE</b>	<i>86</i>	<i>14</i>	<i>82</i>	<i>18</i>	<i>92</i>	<i>8</i>
<b>EE</b>	<i>26</i>	<i>74</i>	<i>21</i>	<i>79</i>	<i>59</i>	<i>41</i>
<b>EL<sup>1</sup></b>	<i>25</i>	<i>75</i>	<i>25</i>	<i>75</i>	<i>39</i>	<i>61</i>
<b>ES</b>	<i>36</i>	<i>64</i>	<i>40</i>	<i>60</i>	<i>29</i>	<i>71</i>
<b>FR</b>	<i>63</i>	<i>37</i>	<i>62</i>	<i>38</i>	<i>65</i>	<i>35</i>
<b>IE<sup>1</sup></b>	<i>37</i>	<i>63</i>	<i>30</i>	<i>70</i>	<i>62</i>	<i>38</i>
<b>IT</b>	<i>60</i>	<i>40</i>	<i>59</i>	<i>41</i>	<i>60</i>	<i>40</i>
<b>CY</b>	<i>7</i>	<i>93</i>	<i>7</i>	<i>93</i>	<i>14</i>	<i>86</i>
<b>LV</b>	<i>46</i>	<i>54</i>	<i>41</i>	<i>59</i>	<i>89</i>	<i>11</i>
<b>LT</b>	<i>50</i>	<i>50</i>	<i>31</i>	<i>69</i>	<i>87</i>	<i>13</i>
<b>LU</b>	<i>8</i>	<i>92</i>	<i>7</i>	<i>93</i>	<i>9</i>	<i>91</i>
<b>HU</b>	<i>46</i>	<i>54</i>	<i>42</i>	<i>58</i>	<i>58</i>	<i>42</i>
<b>MT</b>	<i>:</i>	<i>:</i>	<i>:</i>	<i>:</i>	<i>:</i>	<i>:</i>
<b>NL<sup>1</sup></b>	<i>68</i>	<i>32</i>	<i>48</i>	<i>52</i>	<i>79</i>	<i>21</i>
<b>AT</b>	<i>28</i>	<i>72</i>	<i>25</i>	<i>75</i>	<i>39</i>	<i>61</i>
<b>PL</b>	<i>83</i>	<i>17</i>	<i>62</i>	<i>38</i>	<i>92</i>	<i>8</i>
<b>PT</b>	<i>40</i>	<i>60</i>	<i>31</i>	<i>69</i>	<i>79</i>	<i>21</i>
<b>SI</b>	<i>44</i>	<i>56</i>	<i>35</i>	<i>65</i>	<i>64</i>	<i>36</i>
<b>SK</b>	<i>59</i>	<i>41</i>	<i>52</i>	<i>48</i>	<i>71</i>	<i>29</i>
<b>FI</b>	<i>73</i>	<i>27</i>	<i>72</i>	<i>28</i>	<i>78</i>	<i>22</i>
<b>SE</b>	<i>78</i>	<i>22</i>	<i>77</i>	<i>23</i>	<i>79</i>	<i>21</i>
<b>UK</b>	<i>72</i>	<i>28</i>	<i>71</i>	<i>29</i>	<i>75</i>	<i>25</i>

*Italics = provisional; 1) 2002 data.*

In the European Union the domestic tourism market (residents) accounts for nearly two thirds (59%) of all nights spent in all collective tourist accommodation (see table 3).

Indeed in eight EU25 countries domestic tourism makes up two thirds of all nights spent in collective tourist accommodation. The highest proportion of nights spent by residents can be found in central European and Nordic countries, notably Germany (86%), Poland (83%), Sweden (78%) and Finland (73%).

The inbound tourism market (non-residents) makes up two thirds of all nights spent in collective tourist accommodation in seven EU25 countries. The countries the most dependent on foreign tourists are geographically small countries, notably Luxembourg and Cyprus.

## Top tourism regions in the EU25

The European Union top tourism destinations are reflected in the concentration of tourist nights in collective accommodation in long established mass tourism regions. The top 20 tourism regions account for well over half (57%) of all nights spent in collective accommodation in the European Union.

As can be seen in table 4a the three top ranking regions East of Spain, the Canary Islands and North East of Italy are typical sea and sun destinations. Looking at top regions for tourist nights in hotels and similar establishments the ranking gives a slightly different picture, with Ile-de-France (Paris region) ranking third (see table 4b).

As would be expected regions in Spain, Italy and France host a considerable proportion of tourists' nights spent in collective accommodation as a whole (table 4a), as well as when looking separately at nights in hotels and similar establishment and in other collective accommodation (table 4b) in the European Union. Among the top 20 tourism regions of the European Union, the Italian regions listed account for 15% of total nights, the Spanish regions for 14%, and the French regions for 10%.

Table 4a: Top 20 tourism regions in terms of total nights spent in all collective accommodation<sup>1</sup>, 2003 (1 000)

Rank	Region (NUTS I level)	Nights spent	Share in % of EU-25
1	Este (ES)	152 422	7.3
2	<i>Nord Est (IT)</i>	139 784	6.7
3	Canarias (ES)	83 764	4.0
4	<i>Centro (IT)</i>	79 702	3.8
5	Bayern (DE)	66 236	3.2
6	Méditerranée (FR)	64 203	3.1
7	<i>Westösterreich (AT)</i>	61 120	2.9
8	<i>Île de France (FR)</i>	58 085	2.8
9	<i>Nord Ovest (IT)</i>	52 728	2.5
10	Sur (ES)	51 856	2.5
11	<i>Sud (IT)</i>	47 524	2.3
12	South West (UK) <sup>2</sup>	46 101	2.2
13	Ouest (FR)	42 637	2.0
14	London (UK) <sup>2</sup>	41 200	2.0
15	West-Nederland (NL)	35 553	1.7
16	Sud-Ouest (FR)	35 086	1.7
17	Continente (PT)	35 053	1.7
18	Scotland (UK)	32 367	1.6
19	Baden-Württemberg (DE)	32 208	1.5
20	South East (UK) <sup>2</sup>	31 787	1.5

1) Hotels and similar establishments and other collective accommodation establishments; 2) 2002 data. *Italics* = provisional data.

Table 4b: Top 20 tourism regions in terms of total nights spent<sup>1</sup> by type of accommodation, 2003 (1 000)

Hotels and similar establishments				Other collective accommodation establishments			
Rank	Region (NUTS I level)	Nights spent	Share in % of EU-25	Rank	Region (NUTS I level)	Nights spent	Share in % of EU-25
1	Este (ES)	107 102	7.9	1	<i>Nord Est (IT)</i>	49 420	6.8
2	<i>Nord Est (IT)</i>	90 364	6.6	2	Canarias (ES)	45 597	6.3
3	Île de France (FR)	57 072	4.2	3	Este (ES)	45 321	6.3
4	<i>Centro (IT)</i>	48 177	3.5	4	Méditerranée (FR)	32 631	4.5
5	Westösterreich (AT)	48 082	3.5	5	<i>Centro (IT)</i>	31 525	4.4
6	Bayern (DE)	45 881	3.4	6	Ouest (FR)	26 263	3.6
7	<i>Nord Ovest (IT)</i>	39 678	2.9	7	South West (UK) <sup>2</sup>	21 178	2.9
8	Sur (ES)	39 627	2.9	8	Bayern (DE)	20 355	2.8
9	Canarias (ES)	38 167	2.8	9	West-Nederland (NL)	17 581	2.4
10	London (UK) <sup>2</sup>	36 295	2.7	10	Sud-Ouest (FR)	16 745	2.3
11	<i>Sud (IT)</i>	32 146	2.4	11	Niedersachsen (DE)	16 078	2.2
12	Méditerranée (FR)	31 572	2.3	12	<i>Sud (IT)</i>	15 378	2.1
13	Continente (PT)	27 473	2.0	13	Zuid-Nederland (NL)	14 038	1.9
14	Nisia Aigaiou, Kriti (EL) <sup>2</sup>	27 132	2.0	14	Schleswig-Holstein (DE)	13 343	1.8
15	Scotland (UK) <sup>2</sup>	24 965	1.8	15	<i>Nord Ovest (IT)</i>	13 050	1.8
16	South West (UK) <sup>2</sup>	24 923	1.8	16	Westösterreich (AT)	13 038	1.8
17	Baden-Württemberg (DE)	23 640	1.7	17	Oost-Nederland (NL)	12 664	1.7
18	Bassin Parisien (FR)	22 254	1.6	18	Mecklenburg-Vorpommern (DE)	12 477	1.7
19	Nordrhein-Westfalen (DE)	22 063	1.6	19	Sur (ES)	12 229	1.7
20	Centre-Est (FR)	21 998	1.6	20	South East (UK) <sup>2</sup>	11 207	1.5

1) Residents and non-residents; 2) 2002 data. *Italics* = provisional data.

## Inbound tourism: Top generating markets

Tourism in the European Union is essentially driven by the demands of its citizens. This is exemplified by the fact that intra-EU25 tourist flows accounted for 74% of all nights spent by non-residents in hotels and similar establishments in 2003. Concerning tourists coming from outside the European Union, those from the United States represent the biggest market share (7%).

For most EU25 countries either Germany or the United Kingdom is their top tourism generating country. German tourists are the first market for eight EU25 countries, and British tourists for seven EU25 countries (see table 5). German tourists are the first market for the Czech Republic, Greece, Italy, Latvia, Lithuania, Hungary, Austria, and Poland. British tourists are the first market for Belgium, Spain, France, Ireland, Cyprus, the Netherlands, and Portugal.

Belgian tourists are the first market for Luxembourg, Czechs for Slovakia, Italians for Slovenia, Dutch for Germany, Norwegians for Sweden, Swedes for Denmark and Finland, Finns for Estonia, and US residents for the United Kingdom.

Figure 2: Main countries of origin of tourists in the EU-25 destinations, 2003 (%)

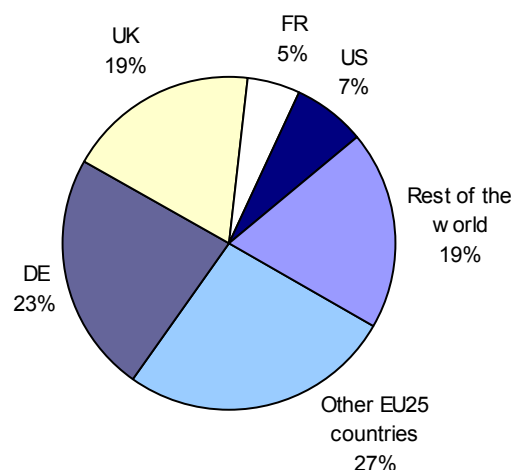


Table 5: Main countries of origin of foreign tourists, 2003 (%)

From \ To	1 <sup>st</sup> Market		2 <sup>nd</sup> Market		3 <sup>rd</sup> Market		4 <sup>th</sup> Market		Share of the top four markets (%)
	Country	%	Country	%	Country	%	Country	%	
EU-25	DE	23.5	UK	18.9	US	7.2	FR	5.0	54.5
BE	UK	22.0	NL	16.2	FR	13.2	DE	11.7	63.1
CZ	DE	32.9	UK	8.1	IT	5.7	US	4.4	51.1
DK	SE	22.5	NO	19.9	UK	9.8	DE	9.4	61.5
DE	NL	11.0	US	10.6	UK	9.4	CH	6.8	37.9
EE	FI	64.1	SE	6.0	DE	5.2	UK	3.2	78.5
EL <sup>1</sup>	DE	27.3	UK	20.3	FR	6.6	IT	6.2	60.4
ES	UK	32.4	DE	27.9	FR	6.7	IT	4.8	71.9
FR	UK	23.5	DE	10.5	IT	10.1	US	8.8	53.2
IE <sup>1</sup>	UK	38.4	US	24.0	FR	6.6	DE	6.4	75.4
IT <sup>1</sup>	DE	30.8	UK	9.1	US	7.9	FR	6.9	54.7
CY	UK	58.6	DE	7.8	SE	4.8	NO	3.8	75.0
LV	DE	12.9	FI	12.4	UK	5.6	SE	5.2	36.1
LT	DE	16.4	PL	11.6	UK	5.8	FI	5.3	39.1
LU	BE	23.9	NL	15.6	DE	14.3	FR	11.1	65.0
HU	DE	33.4	AT	7.2	IT	5.7	US	5.0	51.3
MT	:	:	:	:	:	:	:	:	:
NL	UK	22.2	DE	20.1	US	10.2	BE	5.8	58.3
AT	DE	57.7	NL	7.4	CH	5.1	UK	5.0	75.1
PL	DE	37.4	UK	5.9	US	5.6	IT	5.2	54.0
PT	UK	31.8	DE	16.8	ES	9.3	NL	7.2	65.1
SI	IT	19.8	DE	18.1	AT	17.5	UK	5.3	60.6
SK	CZ	29.5	DE	23.6	PL	12.2	HU	5.5	70.9
FI	SE	12.5	DE	11.2	UK	10.2	US	5.0	39.0
SE	NO	18.0	DE	12.4	UK	10.1	DK	7.6	48.2
UK <sup>1</sup>	US	24.4	DE	8.6	FR	6.2	IE	6.1	45.4

Note: Data based on the number of nights spent of non-residents in hotels and similar establishments.

1) 2002 data.

## Top tourism earners and spenders

**Table 6: EU-25 travel item of the Balance of Payment (Mio Euro), 2003**

	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV
Credit	<b>213 350</b>	7 204	3 148	4 665	20 318	595	9 624	36 870	32 347	3 409	27 612	1 776	197
Debit	<b>215 840</b>	10 712	1 708	5 896	57 187	284	2 247	7 316	20 713	4 188	18 214	557	293
Net	<b>-2 490</b>	-3 510	1 440	-1 231	-36 869	311	7 376	29 556	11 634	- 779	9 398	1 220	- 93

	LT	LU	HU	MT	NL	AT	PL	PT	SI	SK	FI	SE	UK
Credit	564	2 634	3 032	614	8 166	12 436	3 587	6 124	1 185	817	1 655	4 691	20 080
Debit	415	2 361	1 789	190	12 906	10 397	2 480	2 392	666	560	2 150	7 332	42 887
Net	148	273	1 243	424	-4 741	2 039	1 107	3 733	519	258	- 495	-2 638	-22 808

**Table 7: International tourism, 2003 (Mio Euro)**

Rank	Top earners <sup>1</sup>		Top spenders <sup>2</sup>	
1	ES	36 870	DE	57 187
2	FR	32 347	UK	42 887
3	IT	27 612	FR	20 713
4	DE	20 318	IT	18 214
5	UK	20 080	NL	12 906
6	AT	12 436	BE	10 712
7	EL	9 624	AT	10 397
8	NL	8 166	SE	7 332
9	BE	7 204	ES	7 316
10	PT	6 124	DK	5 896
11	SE	4 691	IE	4 188
12	DK	4 665	PL	2 480
13	PL	3 587	PT	2 392
14	IE	3 409	LU	2 361
15	CZ	3 148	EL	2 247
16	HU	3 032	FI	2 150
17	LU	2 634	HU	1 789
18	CY	1 776	CZ	1 708
19	FI	1 655	SI	666
20	SI	1 185	SK	560
21	SK	817	CY	557
22	MT	614	LT	415
23	EE	595	LV	293
24	LT	564	EE	284
25	LV	197	MT	190

1) Travel credits of the Balance of Payments.

2) Travel debits of the Balance of Payments.

In 2003, the European Union earned nearly € 213 billion from international tourism, which was € 4 billion short on 2002 (see table 6).

Spain remains the unchallenged leader of the league of top earners, with nearly € 37 billion in international tourism receipts (17% of the EU25 total) in 2003, followed by France and Italy with 32 € billion and 28 € billion respectively (see table 7).

Accounting for more than a quarter of the EU25 countries' international tourism expenditure, Germany is by far the biggest spender with over € 57 billion in 2003. This volume makes Germany the top generating country in terms of international tourism expenditure. Germany's international travel expenditures are almost three times its travel receipts.

International tourism flows are reflected in the EU25 net travel account. Sixteen of the EU25 countries enjoy a surplus travel account in their Balance of Payments. Spain has the largest tourism foreign trade surplus among the EU25 countries, followed by France and Italy. At more than € 29 billion, Spain's surplus is two and a half times greater than that of France.

## ➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

### CONCEPTS AND DEFINITIONS:

#### Tourism

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

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

#### Hotels and similar establishments

##### Hotels

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

##### Similar establishments

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

#### Other collective accommodation establishments

##### Holiday dwellings

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

##### Tourist camp-sites

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

##### Other collective establishments n.e.c.

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

#### 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.

#### Travel item of the Balance of Payment

The debit side of the item Travel consists of goods and services which are acquired by residents who stay abroad for less than one year. The credit side includes purchases of the same type made by foreign travellers on the national territory. This item contains two main categories of travel: business travel and personal travel (leisure, study, health-related purposes, etc.). Note that international transportation costs of the traveller to destination are recorded under the heading "transportation", but all movements within the country, including cruises, are entered under "travel".

#### Regional data

The data are based on the regional divisions in Eurostat's Nomenclature of Territorial units for Statistics (NUTS) at the highest level (NUTS I).

#### Country abbreviations:

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

#### Symbols:

: data not available

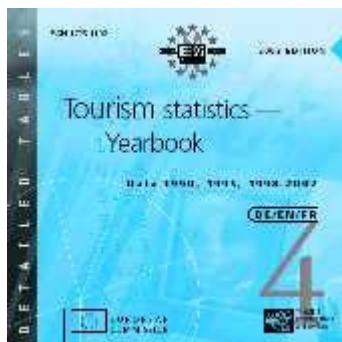
This publication has been produced in collaboration with Natalie Kirwan (comments) and Christiane Gengler (tables, figures and layout).

#### Reference publications:

## ***Further information:***

### ➤ **Reference publications**

Title CD-ROM - Tourism statistics - Yearbook Data 1990,1995,1998-2002



Catalogue No KS-DS-03-001-3A-Z Price EUR 120

### ➤ **Databases**

[EUROSTAT Website/Industry, trade and services/Tourism](http://ec.europa.eu/eurostat/Website/Industry_trade_and_services/Tourism)

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