

# Statistics

## in focus

INDUSTRY, TRADE AND SERVICES

POPULATION AND SOCIAL CONDITIONS

SCIENCE AND TECHNOLOGY

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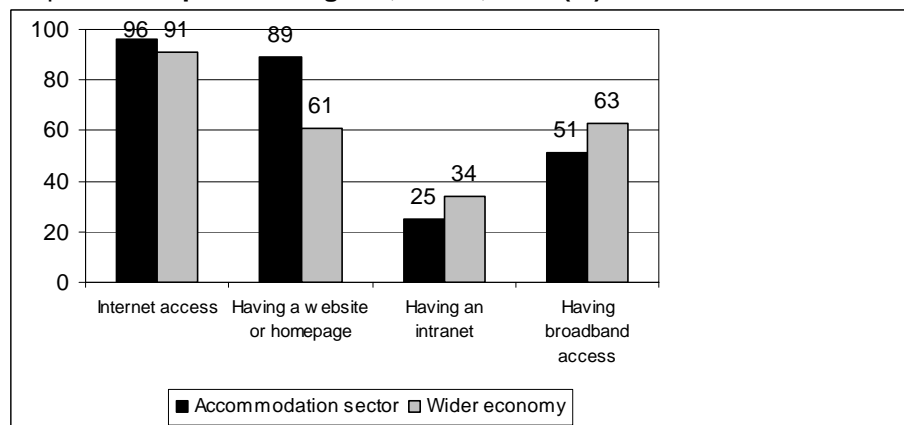


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## Tourism and the Internet in the European Union

- With 89% of all enterprises (of 10 or more persons employed) having a website or homepage, the accommodation sector is largely in advance of enterprises in the wider economy, where the value is 61%.
- As regards the provision of advanced facilities on websites, the accommodation sector is even more advanced, with 63% of enterprises offering direct access to catalogues and prices. In the wider economy, this is only the case for 28% of all enterprises.
- Using services related to travel and accommodation is one of the most frequent internet activities: 47% of all internet users have used such services in the three months prior to the survey.
- The likelihood of internet users using services related to travel and accommodation increases strongly with their educational level. Whereas only 7% of internet users with a low educational attainment level indicate that they have used such services during the 3 months prior to the survey, this is the case for 47% of internet users with a high educational attainment level.
- At 26% the share of all enterprises in the accommodation sector, that have IT systems for orders and purchases that link automatically to other internal IT systems is considerably lower than the share (34%) among enterprises in the wider economy.
- Similarly, the use of an intranet is less common in the accommodation sector (25% of all enterprises) than in the wider economy (34% of all enterprises).
- With an average of 96%, the accommodation sector is among to the sectors with the highest level of access to the internet. However, the accommodation sector is lagging behind in the adoption of advanced technologies with only 51% of the enterprises having broadband access.

Graph 1: Enterprises using ICT, EU-25, 2005 (%)



EU-25 excluding FR and MT due to the lack of data availability.

Source: Eurostat, Community survey on ICT usage in enterprises (10 or more persons employed)

## The accommodation sector and its clients – a success story in the usage of ICTs

As regards its client relationships, the accommodation sector can be considered a forerunner in its usage of information technologies and there are a variety of different indicators that show this.

One of the most important indicators is the share of enterprises that have a website or a homepage. Websites or homepages are the starting point for e-business, in the sense that they provide instant information to all potential clients regardless of their geographic location.

89% of all accommodation sector enterprises (of 10 or more persons employed) in the EU 25 have a website or a homepage, compared to only 61% of enterprises in the wider economy.

This situation is very similar across all Member States, with the share of enterprises having websites or homepages being at least 6 percentage points (in Sweden) in advance of the wider economy. Particularly high differences (beyond 35 percentage points) are noticeable in all three Baltic States as well as all Southern European countries for which data is available (Portugal, Spain, Italy and Cyprus). (see table 1)

The role of websites as a starting point of e-business goes beyond their role as a pure marketing tool. More advanced websites include additional facilities such as direct access to catalogues and prices. Also in this respect, enterprises in the accommodation sector are largely in advance of other sectors of the economy.

63% of all EU25 accommodation enterprises offer this facility; more than twice as frequently as offered in the wider economy (28%).

Table 1: Share of enterprises having a website or a homepage, 2005.

%	Wider economy	Accommodation sector
<b>EU-25</b>	61	89
<b>BE</b>	65	97
<b>CZ</b>	67	88
<b>DK</b>	82	u
<b>DE</b>	72	91
<b>EE</b>	53	91
<b>EL</b>	56	80
<b>ES</b>	43	81
<b>FR</b>	:	:
<b>IE</b>	60	77
<b>IT</b>	54	92
<b>CY</b>	44	83
<b>LV</b>	29	65
<b>LT</b>	41	80
<b>LU</b>	59	66
<b>HU</b>	40	68
<b>MT</b>	:	:
<b>NL</b>	72	88
<b>AT</b>	70	94
<b>PL</b>	49	75
<b>PT</b>	37	75
<b>SI</b>	59	90
<b>SK</b>	61	88
<b>FI</b>	76	97
<b>SE</b>	85	91
<b>UK</b>	74	100

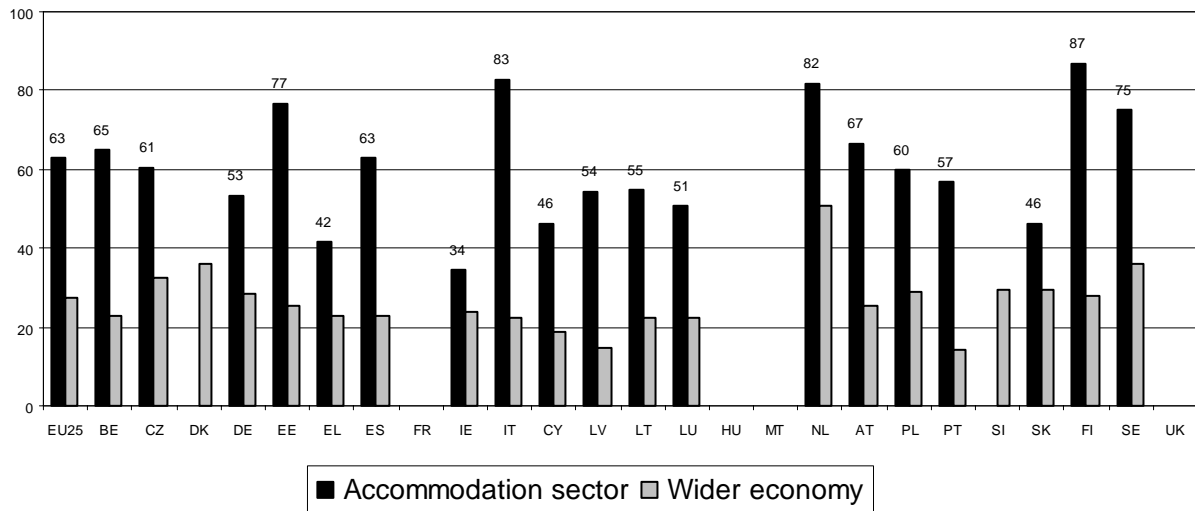
*EU-25 excluding FR and MT due to lack of data availability.*

*Source: Eurostat, Community survey on ICT usage in enterprises (10 or more persons employed).*

Again, the difference between the Member States is only one of degree, putting the accommodation sector in advance of the wider economy in each of the Member States with a difference ranging from 10 percentage points in Ireland to 60 percentage points in Italy (see graph 2).

These data clearly show that the accommodation sector has recognised the opportunities offered by information and communication technologies for its client relationships.

Graph 2: Share of enterprises offering access to catalogues and prices through their websites, 2005 (%)



EU-25 excluding FR, MT and UK due to lack of data availability, Data unreliable for DK, HU, SI.  
 Source: Eurostat, Community survey on ICT usage in enterprises (10 or more persons employed).

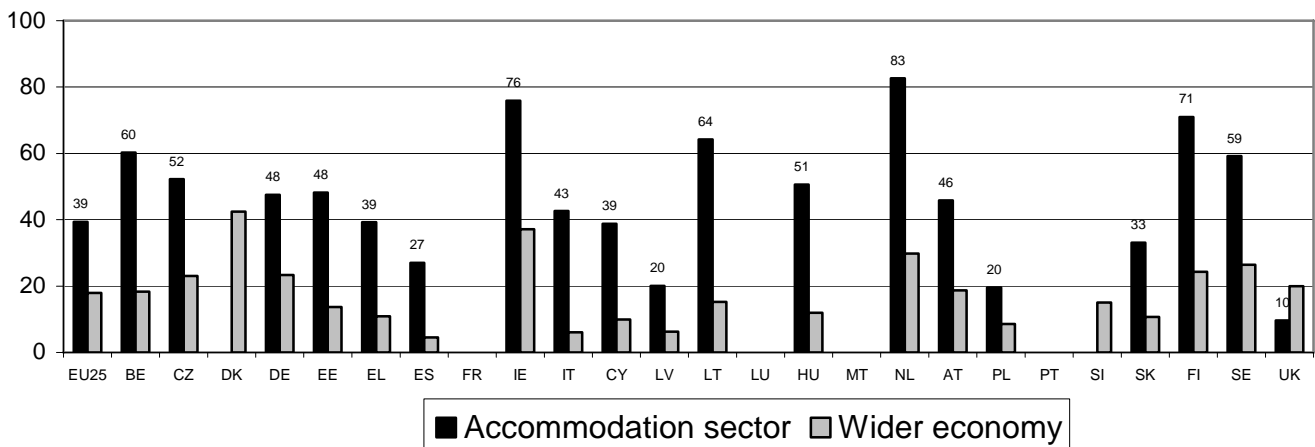
That the websites of the accommodation sector are also economically successful is confirmed by data regarding the orders actually received over the internet.

From this data, it can be seen that enterprises in the accommodation sector not only have more websites, but that these websites are more than twice as likely to result in orders received over the internet than websites in the wider economy.

In EU-25, 39% of all accommodation sector enterprises with websites have received orders via the internet, whereas this was the case for only 18% of enterprises in the wider economy. This advance of the accommodation sector exists in virtually all Member States (see graph 3).

Moreover, it can be assumed that additional bookings that are realised by traditional means (such as the telephone) are based on a pre-sale stage dependent on information search on the internet..

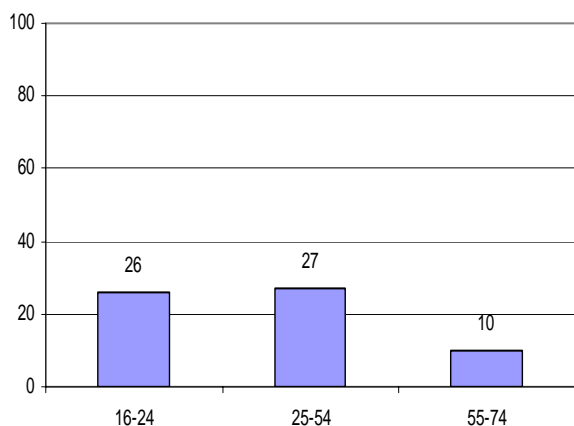
Graph 3 : Share of enterprises with websites actually receiving orders via the web, 2005 (%)



EU-25 excluding FR, MT and PT due to lack of data availability. Data unreliable for DK, LU, SI.  
 Source: Eurostat, Community survey on ICT usage in enterprises (10 or more persons employed)

## Services related to travel and accommodation widely used by internet users

**Graph 4: Share of the internet for the purpose of travel and accommodation in the three months prior to the survey by age group, 2005 (%)**



*EU-25 excluding BE, DE, FR, IR, MT.*

*Source: Eurostat Community survey on ICT usage in households and by individuals.*

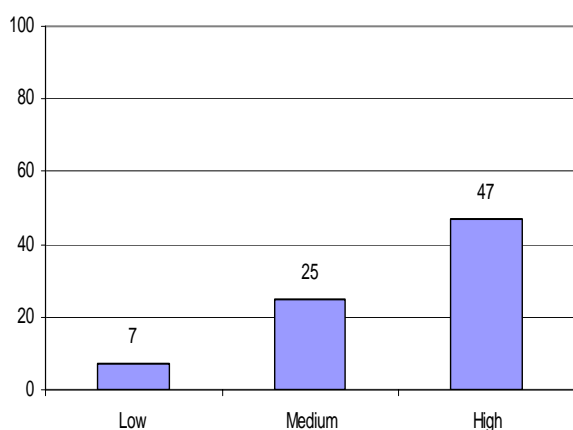
Data from the Community survey on ICT usage in households and by individuals confirm that this offer is actually taken up by the potential clients.

Using services related to travel and accommodation is the most frequent internet activity after sending e-mails and finding information about goods and services in general.

47% of the internet users in the European Union say that they have used services related to travel and accommodation in the three months prior to the survey, more persons than those having used internet banking (37%), having played or downloaded games or music (37%) or having sought health information on injury, disease or nutrition (30%).

When considering the effect of websites on potential clients, it is important to note that the popularity of using services related to travel and accommodation varies considerably between different groups of the population.

**Graph 5: Share of the internet for the purpose of travel and accommodation in the three months prior to the survey by level of educational attainment, 2005 (%)**



*EU-25 excluding BE, DE, FR, IR, MT.*

*Source: Eurostat Community survey on ICT usage in households and by individuals.*

As a result of being more active internet users, young Europeans are for example more likely to look for services related to travel and accommodation on the internet than older Europeans.

What is even more striking, however, is the fact that highly educated Europeans are almost seven times as likely to consult websites related to travel and accommodation than Europeans with a low educational attainment level (see graph 5).

In fact, almost half of all highly educated Europeans have said that they have used the internet for services related to travel or accommodation in the 3 months prior to the survey.

## The accommodation sector - a laggard regarding the full implementation of e-business

The advanced position of the accommodation sector as regards its usage of information technology for client relationships contrasts sharply with its rather low level of integration of e-business processes, thus depriving the accommodation sector from the potential productivity gains associated with such integrated technologies.

One of the relevant indicators in this context is the share of enterprises that have IT systems for orders and purchases that link automatically to other internal IT systems. Whereas this share is 34% in the wider economy, it is only 26% in the accommodation sector. It has to be said, however, that this situation is less uniform across the Member States. Particularly in some of the new Member States (the Czech Republic, Estonia, Cyprus, Lithuania and Poland), the integration seems to be more advanced in the accommodation sector than in the wider economy.

High integration of sales with other business processes such as invoicing, accounting or stock management is usually a feature of the manufacturing sector, and it could be argued that such an integration is less relevant to services sectors such as the accommodation sector.

The data shows, however, that the accommodation sector lags behind other sectors of the economy not only in its supply chain management, but also in other aspects of the usage of information technologies. This is the case for instance as regards the use of an intranet. Whereas an intranet is used in 34% of all enterprises in the wider economy, it is only used by 25% of the enterprises in the accommodation sector. The situation is very similar across almost all Member States.

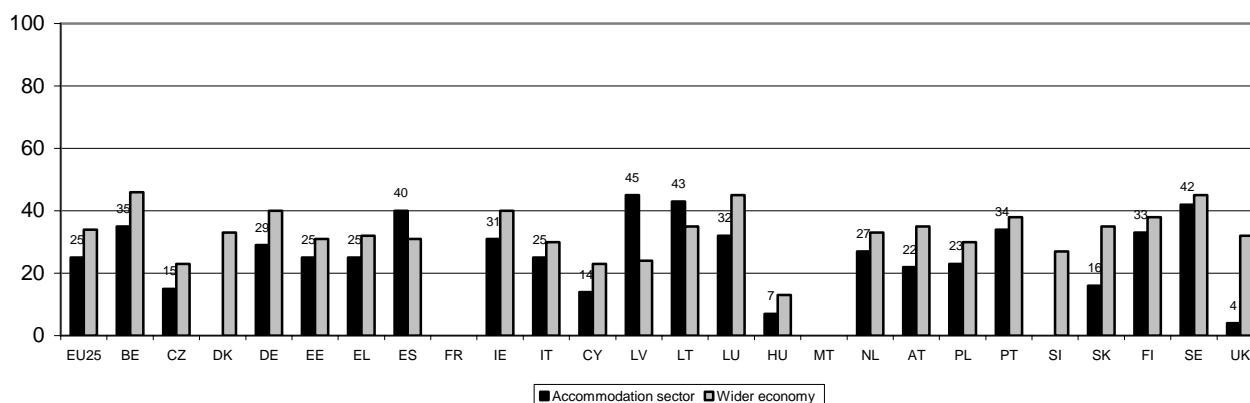
Table 2: Share of enterprises that have IT systems for orders and purchases that link automatically to other internal IT systems 2005.

%	Wider economy	Accommodation sector
EU-25	34	26
BE	47	12
CZ	18	20
DK	62	u
DE	43	31
EE	25	47
EL	50	39
ES	26	20
FR	:	:
IE	30	16
IT	48	39
CY	31	73
LV	17	15
LT	18	38
LU	45	23
HU	1	0
MT	:	:
NL	61	47
AT	35	23
PL	18	21
PT	37	23
SI	20	12
SK	26	17
FI	60	56
SE	25	14
UK	10	1

EU-25 excluding FR and MT due to lack of data availability.

Source: Eurostat, Community survey on ICT usage in enterprises (10 or more persons employed)

Graph 6: Share of enterprises using an intranet, 2005 (%).



EU-25 excluding FR, MT due to lack of data availability; Data unreliable for DK, SI.

Source: Eurostat, Community survey on ICT usage in enterprises (10 or more persons employed).

## IT infrastructure in the accommodation sector – a vicious circle?

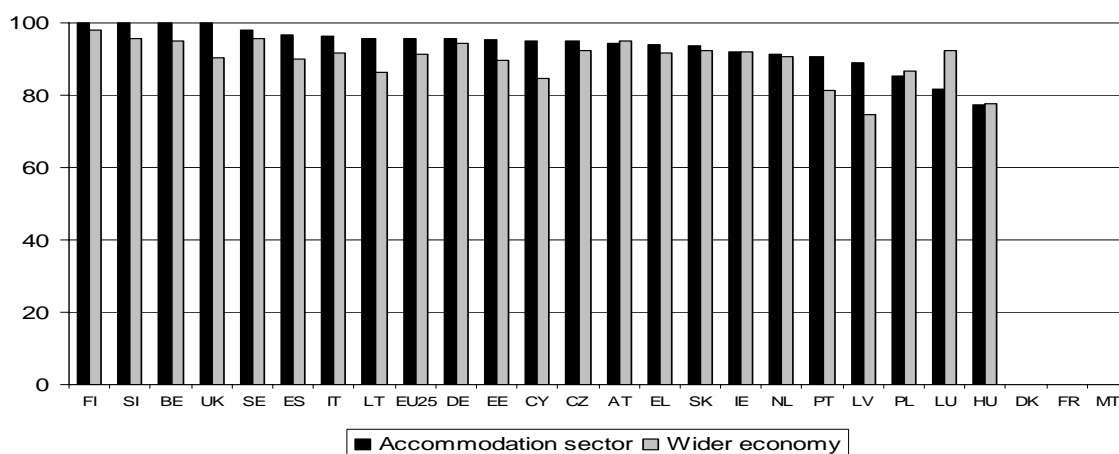
The specific usage of the internet for client relationships is also mirrored in the technologies adopted for the internet.

On the one hand, the access of the accommodation sector to the internet is particularly high, which is of course a precondition for having websites and maintaining client relationships over the internet. Whereas 91% of all enterprises in the economy have access to the internet, enterprises in the

accommodation sector reach a share of 96% and are thus close to saturation (see graph 6).

This is the case despite the relatively large share of smaller enterprises in the sector. In Belgium, Slovenia, Finland and the United Kingdom, saturation has actually been reached with 100% of the enterprises in the accommodation sector reporting that they have access to the internet.

Graph 7: Share of enterprises with access to the internet, 2005 (%)



EU-25 excluding FR, MT due to lack of data availability; Data unreliable for DK.

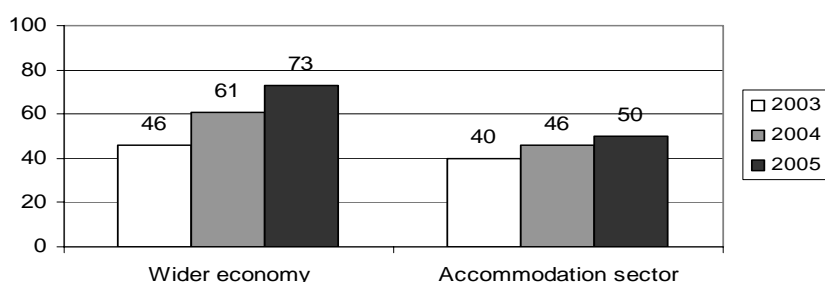
Source: Eurostat, Community survey on ICT usage in enterprises (10 or more persons employed).

On the other hand, however, the technologies used to connect to the internet are predominantly old technologies, which do not allow processing large quantities of data in a reasonable period of time.

While broadband technologies, which allow more information to be conveyed at a faster speed,

have reached ever increasing levels of adoption in the wider economy, the adoption of broadband in the accommodation sector is lagging behind. The share of broadband technologies for internet access exploded from 46% in 2003 to 73% in 2005 in the EU15, the growth was much more moderate for the accommodation sector (see graph 8).

Graph 8: Share of enterprises with internet access having broadband access in EU-15 (%)



EU-15 excluding FR, IT, SE due to lack of data availability.

Source: Eurostat, Community survey on ICT usage in enterprises (10 or more persons employed)

As in all sectors, the question is whether the usage that an enterprise wants to make of information and communication technologies determines its choice of

technologies, or whether the technologies available to an enterprise determine the usage that is possible.

## ➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

### Abbreviations and symbols:

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)

u unreliable  
: not available

### Community survey on ICT usage in enterprises:

**Survey period:** First quarter 2005

**Aggregation of results:** For the calculation of EU-25 / EU-15 no estimations were made. Unreliable data is included in the EU aggregates.

#### Activity coverage

- **Tourism accommodation sector:** This includes NaceRev.1 55.1 Hotels and similar establishments and 55.2 Camping sites and other provision of short-stay accommodation.
- **The wider economy:** Covers 7 categories of NACE Rev. 1.: Section D (manufacturing), section F (construction), section G (distributive trade), NACE 55.1 and 55.2 (hotels, camping sites and other provisions of short-stay accommodation), section I (transport, storage and communication), section K (real estate, renting and business activities) and NACE 92.1 and 92.2 (motion picture, video, radio and television activities)

**Size coverage:** Enterprises with 10 or more persons employed

For a full overview of the NACE classification, please refer to RAMON, Eurostat's classification server:  
<http://www.europa.eu.int/comm/eurostat/ramon>

### Community survey on ICT usage in households and by individuals

**Sampling units:** Households and individuals

**Survey period:** April/May 2005

**Reference period:** Three months prior to the survey for the persons who used the Internet for travel and accommodation services.

**Lower age limit for survey of individuals:** 16 years

**Upper age limit for survey of individuals:** 74 years

**Aggregation of results:** For the calculation of EU-25 no estimations were made.

**Educational attainment levels:** The International Standard Classification of Education (ISCED), as revised in 1997, is the reference of educational attainment levels. Education is divided into seven main levels that have been grouped into three levels for the purpose of this survey:

- ✓ Low: defined as ISCED levels 1 and 2, primary, and lower secondary education. These two levels normally represent compulsory education;
- ✓ Medium: defined as ISCED levels 3 and 4, upper secondary and post-secondary non-tertiary education. This level generally starts at the end of compulsory education;
- ✓ High: defined as ISCED levels 5 and 6, first stage and second stage of tertiary education.

#### Definitions

**IT system:** Information technology system for internal use.

**Broadband:** A service or connection allowing a considerable amount of information to be conveyed, such as television pictures, generally defined as a bandwidth greater than 2Mbps.

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