



ECONOMICAL – FINANCIAL CRISIS AND THE TOURISM TRENDS IN THE CRISIS PERIOD

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Abstract:

Challenges generated by the global economic crisis, terrorism, epidemics, which therefore directly affected global tourism industry, raised the global question to approach the tourism in a new vision, more complex. Thus, WTO and the World Travel & Tourism Council considered that this will be important condition for the reception destinations and local communities development. The new tourism ventures to include a new dimension of travel and tourism, as a mature response to a world more complicated. Global awareness of the importance of tourism has triggered a new vision on the opportunities offered by global tourism.

This article provides information on the latest statistics on tourism in the European Union (EU). The tourism is an important sector due to its economic potential, employment of labor and its social and environmental implications. Tourism statistics are used to monitor not only EU policies in tourism but also regional policy and sustainable development policy. The role of tourism, for both business and citizens, has grown considerably in recent decades. According to the estimates of DG Enterprise and Industry of the European Commission, tourism accounts for over 5% of the EU-27 GDP. Tourist accommodation sector provides 2.3 million jobs in the EU-27 and the total number of jobs in the entire tourism sector in the EU-27 is estimated to be between 12 and 14 million people (according to preliminary estimates of tourism satellite accounts).

Key words: *tourism, economic and financial crisis, globalization, finance, tax system*

1. Introduction

The EU is a major tourist destination, six of its member States being among the top ten holiday destinations in the world. Tourism is an important activity in the EU,

which has the potential to contribute to employment and economic growth, and the development of rural, peripheral or less developed. Given these characteristics, harmonized and reliable statistics are needed in this area, and in the broader context of regional policy and sustainable development policy.

Tourism can be a significant factor in the development of European regions. The infrastructure created for tourism purposes contributes to local development, and the jobs created or maintained can help to offset industrial or rural decline. Sustainable tourism involves protection and development of cultural and natural heritage, from art to gastronomy and biodiversity conservation.

The demand for hotel services, whether by businesses or households, tends to fluctuate more strongly than for many other products or services. Business demand tends to fluctuate with the economic cycle, and individuals are more likely to curb their spending on tourism activities during periods of low consumer confidence. As well as economic uncertainties, political and social uncertainties also have a considerable impact on demand, although it should be noted that uncertainties caused throughout the region by the 'Arab Spring' in 2011 fall outside the reference timeframe for this publication. (Cosmescu, Tileaga, Cristescu 2013). Tourism can be an important source of revenue in national economies, and is an important factor in generating – directly and indirectly - jobs of varied skill requirement. It promotes infrastructural development, although it also has social and environmental implications. These various factors drive the demand for reliable and harmonised tourism statistics.

2. Data sources and availability

In statistical context, tourism refers to the activity of visitors taking a trip to a destination outside their usual environment for more than a year. These trips can be made from any main reason, including business, leisure or other personal reasons outside employment by a resident employer, a household or an enterprise in visited place. Currently tourism statistics is limited to a minimum stay of one night, since 2014 it will be covered the visits abroad for less than one day.

A system of tourism statistics was established by Council Directive 95/57/EC of 23rd of November 1995, concerning the collection of statistical data on tourism. According to this legal basis, Member States are required to regularly provide a set of comparable statistics on tourism. The changes in 2004 and 2006 were linked to EU enlargement and recent changes in the global tourism market. In July 2011 the European Parliament (EP) and the Council of the European Union adopted the new Regulation 692/2011 on European statistics on tourism and repealing the Council Directive 95/57/EC; this Regulation will enter into operation in 2012.

EU tourism statistics include two main components: statistics on capacity and occupancy of collective tourist accommodation structures and statistics on tourism demand. In most Member States, the first mentioned component is collected using data from the accommodation, while the second is mainly collected through surveys conducted at borders, or household surveys.

Statistics on collective tourist accommodation capacity include the number of units, number of rooms and of seats. These statistics are available depending on the type of structure or region and are produced annually.

Statistics on occupancy of collective tourist accommodation structures refers to the number of arrivals (in the accommodation) and the number of nights spent by residents and non-residents, data broken down by type of structure and the region; annual and monthly statistics are available. Also, statistics on the use of accommodations (occupation) are elaborated. Statistics on tourism demand relates to the tourism participation, i.e. the number of people who made at least one trip of a minimum of four nights during the reference period (quarter or year). There are statistics on the number of tourist trips made (and spent the night), broken down by:

- country of destination;
- month of departure;
- length of stay;
- organization type of the trip;
- way of transport;
- accommodation type;
- expenses.

Data can be analyzed using socio-demographic explanatory variables such as age and gender. It is also possible to use data from official sources to study the tourism. These statistics includes:

- data on employment in the tourist accommodation sector from Labor Force Survey, broken down by working time (full / partial), occupational status, age, education level, gender, age, job retention and employment by the same employer (annual or quarterly data);
- data on personal income and expenses generated by the passengers, provided by the payments balance;
- transport statistics (e.g. air transportation);
- structural business statistics can be used to provide information on tourism flows and economic performance of certain sectors related to tourism.

3. Tourism volume - demand and supply

Residents in the EU (excluding Malta) conducted in 2010 over 1000 million holiday trips. Short journeys (one to three nights) represented slightly more than half (55.5%) of journeys (see Table 1), and approximately three-quarters (76.6%) of journeys had national destinations, while 23.4% were travel abroad.

Table 1: Number of holiday trips in EU Member States

	Number of trips (1 000)			Breakdown of all trips by destination and duration (%)			
	All trips	Short trips (1-3 nights)	Long trips (4+ nights)	Short domestic trips (1-3 nights)	Long domestic trips (4+ nights)	Short outbound trips (1-3 nights)	Long outbound trips (4+ nights)
EU (1)	1 046 804	580 887	465 916	50.2	26.4	5.3	18.1
Belgium	10 746	3 832	6 913	14.0	10.3	21.7	54.0
Bulgaria	6 280	4 189	2 090	63.9	26.7	2.8	6.6
Czech Republic	25 735	15 546	10 189	55.2	22.8	5.2	16.8
Denmark	27 788	20 345	7 443	66.8	11.0	6.4	15.7
Germany	221 407	115 320	106 087	46.0	21.6	6.1	26.4
Estonia	2 630	1 928	702	60.4	8.4	12.8	18.3
Ireland (2)	10 638	5 559	5 079	39.7	11.3	12.6	36.4
Greece	12 159	5 525	6 635	44.2	47.3	1.2	7.3
Spain	118 931	79 804	39 127	65.1	27.3	2.0	5.6
France	197 653	103 744	93 910	50.1	39.3	2.4	8.2
Italy (2)	80 799	41 449	39 349	46.6	35.4	4.7	13.3
Cyprus	1 783	836	946	42.0	11.4	4.9	41.7
Latvia	4 114	3 261	853	72.5	7.3	6.8	13.5
Lithuania	3 270	2 170	1 101	53.8	11.9	12.6	21.7
Luxembourg	1 240	474	766	<1	<1	38.0	61.7
Hungary	18 404	12 507	5 897	60.0	19.5	7.9	12.6
Malta	.	.	.	.	.	.	.
Netherlands	29 580	10 569	19 011	25.3	22.0	10.4	42.3
Austria	16 887	7 800	9 087	31.2	19.1	15.0	34.7
Poland	34 557	18 136	16 421	50.1	35.2	2.4	12.3
Portugal	11 168	7 487	3 681	64.5	25.6	2.6	7.4
Romania	11 163	6 761	4 403	59.9	34.0	<1	5.4
Slovenia	4 244	2 567	1 677	34.3	9.8	26.2	29.7
Slovakia	5 947	2 571	3 375	35.0	25.4	8.3	31.3
Finland	36 125	28 186	7 939	69.9	15.1	6.2	6.9
Sweden	42 041	27 801	14 240	58.5	19.5	7.6	14.4
United Kingdom	111 515	52 521	58 994	41.4	19.9	5.7	33.0
Norway	17 552	9 951	7 601	45.5	20.1	11.1	23.2
Croatia	6 449	2 939	3 509	35.2	40.3	10.4	14.1

(1) Estimate made for the purpose of this publication, compiled using the sum/average of the latest available data for the Member States, excluding Malta.

(2) 2009.

Source: Eurostat (online data code: tour_dem_tta)

In some Member States, over half of the passengers have been traveling abroad, this was the case for Luxembourg, Belgium, Slovenia and the Netherlands. However, less than 10% of holiday trips made by residents in Romania, Spain, Greece, Bulgaria and Portugal were traveling abroad. These figures appear to be influenced by the size of a Member State and its geographic location (generally in smaller countries situated in the north of Europe there is a stronger tendency to travel abroad).

It is estimated that in 2010 approximately 51.5% of the EU-27 participated in the tour, i.e. they made at least one trip of at least four nights during the year. And in this regard there are large variations, whereas the participation rate ranged from 5.3% in Bulgaria to 87.8% in Cyprus (see Table 2).

Table 2: Tourism indicators 2005-2010

	Hotels & similar establishments (units)		Other collective accommodation establishments (units)		Bed places in hotels & similar establishments (1 000)		Nights spent in hotels & similar establishments (1 000) (1)		Share of the population (aged 15+) taking part in tourism trips of at least 4 nights (%)	
	2005	2010	2005	2010 (2)	2005	2010 (3)	2005	2010 (4)	2005 (5)	2010 (6)
EU-27 (7)	194 199	203 854	210 881	256 202	11 198	12 469	1 481 479	1 563 605	55.3	51.5
Euro area (7)	144 889	143 861	162 666	188 803	8 848	9 511	1 173 090	1 255 826	59.7	55.8
Belgium	1 899	2 088	1 461	1 458	121	128	14 610	17 023	49.8	53.3
Bulgaria	1 230	1 823	325	449	201	245	15 428	15 002	...	5.3
Czech Republic	4 278	4 300	3 327	2 935	232	256	25 209	26 358	55.7	53.7
Denmark	482	482	608	584	70	82	10 100	10 939	64.1	65.6
Germany	36 575	35 867	18 756	17 665	1 621	1 722	200 767	228 302	82.1	65.5
Estonia	317	375	467	766	25	30	3 542	4 028	24.6	39.0
Ireland	4 407	3 451	4 458	4 466	149	152	25 198	23 698	...	...
Greece	9 036	9 732	341	314	662	763	54 017	62 919	47.0	41.2
Spain	17 607	18 635	17 151	23 318	1 580	1 785	245 637	267 147	39.8	41.6
France	18 689	17 506	10 689	11 128	1 266	1 248	198 039	195 906	61.9	64.9
Italy	33 527	33 987	96 409	116 257	2 028	2 253	240 320	254 177	48.7	48.6
Cyprus	785	690	134	149	91	84	14 939	13 599	...	87.8
Latvia	337	495	81	133	19	27	2 303	2 460	19.4	17.8
Lithuania	331	381	193	172	20	24	2 062	2 263	25.6	31.5
Luxembourg	293	285	252	241	14	16	1 360	1 282	...	61.4
Hungary	2 061	2 033	1 056	921	162	161	15 749	15 617	49.8	47.3
Malta	173	153	6	7	37	39	7 464	7 475	...	...
Netherlands	3 135	3 172	4 025	3 782	192	212	29 519	33 708	68.5	70.6
Austria	14 267	13 461	6 281	6 878	571	589	76 073	81 344	54.4	58.6
Poland	2 200	3 223	4 523	3 983	170	241	20 333	27 141	32.8	33.2
Portugal	2 012	2 011	288	307	264	280	35 521	37 391	28.3	22.8
Romania	3 608	4 724	618	498	216	258	17 471	15 418	19.7	23.6
Slovenia	344	647	358	348	30	44	4 975	5 853	59.3	56.6
Slovakia	685	1 322	1 131	1 269	57	75	6 833	6 635	...	52.6
Finland	936	642	459	467	118	121	14 275	15 737	58.1	57.9
Sweden	1 857	1 985	2 089	2 119	197	224	22 900	27 338	...	...
United Kingdom	32 926	40 184	35 395	55 605	1 062	1 411	176 835	165 143	62.5	57.3
Iceland	319	325	294	315	17	20	1 569	2 025	...	...
Liechtenstein	46	40	112	114	1	1	111	115	...	...
Norway	1 136	1 128	1 121	1 165	144	175	17 110	18 377	71.2	72.6
Switzerland	5 636	5 477	...	...	274	275	32 944	36 208	...	72.9
Croatia	1 015	841	515	1 276	203	152	21 277	19 345	38.2	38.1
FYR of Macedonia	...	172	...	221	...	13	...	705	...	...

(1) Nights spent by residents and non-residents.

(2) France, 2009.

(3) United Kingdom, 2009.

(4) Ireland, Greece and the United Kingdom, monthly data was used to calculate the annual figure; Ireland and Luxembourg, 2009.

(5) Croatia, 2004.

(6) The Czech Republic, Estonia, Greece, Spain, France, Italy, the United Kingdom, Norway and Switzerland, 2009.

(7) Data for 2010 (in italics): estimates made for the purpose of this publication, compiled using the sum/average of the latest available data for the Member States.

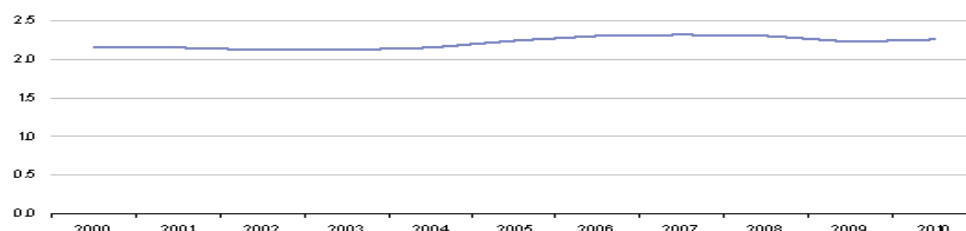
Source: Eurostat (online data codes: tin00039, tin00040, tin00041, tin00043, tour_occ_nim, tin00045, tps00001 and tps00010)

On the supply side, it is estimated that in 2010 there were nearly 204 000 active hotels and similar establishments in the EU27, and over 256 000 other types of collective tourist accommodation structures (such as campsites and holiday homes). Hotels and similar establishments have provided over 12.4 million beds, of which almost half (46.2%) were in Italy (2.3 million persons), Spain (1.8 million people) or Germany (1.7 million people). In 2010, tourists and non-residents (foreigners) have spent over 1 500 million nights in hotels and similar establishments in the EU27.

During the past decade, the number of tourist nights spent in collective tourist accommodation structures generally showed an upward trend. However, reduction of travel after the 2001 terrorist attacks in the United States and the economic and financial crisis have caused short-term shocks: the number of tourism nights spent in collective tourist accommodation structures in the EU-27 fell by 0.6% in 2008 and by 2.8% in 2009. (Eurostat, monthly data, 2008-2009). In 2010, however, the number of

nights spent in collective tourist accommodation increased by 0.9%, accounting for more than 2 nights 250 million (see Chart 1).

Figure 1: The number of nights spent in collective tourist accommodation, EU-27, 2000-2010



(1) Nights spent by residents and non-residents; estimates made for the purpose of this publication.
Source: Eurostat (online data codes: tour_occ_ninat and tour_occ_nim)

4. Main destinations

In 2010, German residents spent 640.6 million nights in collective tourist accommodation outside Germany, and UK residents spent 504.3 million nights abroad, residents of these two countries accounted for almost half (49.4%) of the total number of nights spent abroad by residents of the EU27. Taking into account the ten Member States whose residents have spent most nights in collective tourist accommodation structures abroad, they accounted 87.4% of the 2 315,3 million nights spent abroad in 2010 (see Table 3).

Table 3: The first 10 origin member states for foreign travel 2010

	Nights abroad	Share (%)
EU-27 (1)	2 315 286	100.0
Top 10	2 024 175	87.4
1 Germany	640 570	27.7
2 United Kingdom (2)	504 290	21.8
3 France (2)	192 575	8.3
4 Italy (3)	184 210	8.0
5 Netherlands	158 442	6.8
6 Spain (2)	88 028	3.8
7 Belgium	80 395	3.5
8 Sweden (3)	67 961	2.9
9 Austria	59 053	2.6
10 Poland	48 649	2.1

(1) Estimate made for the purpose of this publication, based on annual and quarterly data.

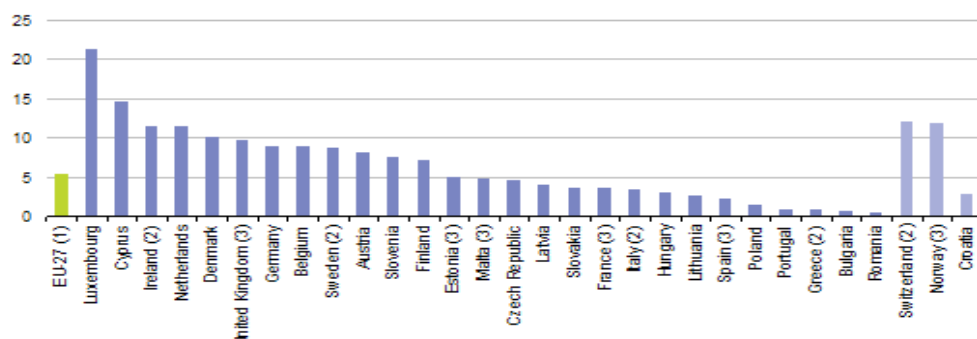
(2) Estimate based on quarterly data.

(3) 2009.

Source: Eurostat (online data codes: tour_dem_trnw and tour_dem_trnq)

Given the population size of a country, Luxembourg was the Member State whose residents have spent most nights abroad per capita (an average of 21.2 nights), followed by Cyprus (14.7), Ireland (11.6 - data for 2009) and the Netherlands (also 11.6). At the other end of the range, Romanians, Bulgarians and Greeks (data for 2009) spent, on average, less than one night holidays abroad in 2010 (see Chart 2).

**Figure 2: The country of origin for foreign travel 2010
(average nights spent abroad per capita)**



(1) Estimate made for the purpose of this publication, using the latest available data for the Member States

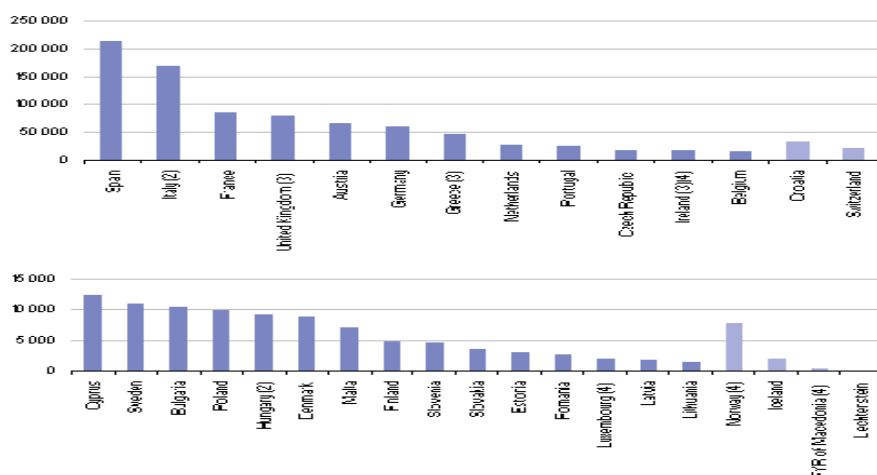
(2) 2009.

(3) Estimate based on quarterly data.

Source: Eurostat (online data codes: tour_dem_tnw, tour_dem_tnq and tps00001)

In 2010, Spain was the main tourist destination in the EU for non-residents (persons from abroad), with 213.3 million nights spent in collective accommodation units, representing 23.2% of total EU-27. The first three EU destinations for non-residents were Spain, Italy (167.8 million nights) and France (85.2 million nights), which together accounted 50.7% of EU-27 nights spent by those non-residents. The less common destinations were Lithuania, Latvia and Luxembourg (data for 2009) to interpret these figures it is necessary to take into account the size of the Member States concerned (see Figure 3 and Table 4).

**Figure 3: Tourist Destinations - nights spent in collective tourist accommodation, 2010
(1 000 nights spent by non-residents in a given country)**



(1) Note the differences in the scales employed between the two parts of the figure.

(2) Provisional.

(3) Estimate based on monthly data.

(4) 2009.

Source: Eurostat (online data codes: tour_occ_pinat and tour_occ_nim)

Table 4: The top 10 tourist destinations - nights spent in collective tourist accommodation, 2010
(1 000 nights spent by non-residents in a given country)

	Nights in country	Share (%)
EU-27 (1)	919 522	100.0
Top 10	790 808	86.0
1 Spain	213 350	23.2
2 Italy	167 839	18.3
3 France	85 191	9.3
4 United Kingdom (2)	80 373	8.7
5 Austria	66 838	7.3
6 Germany	59 659	6.5
7 Greece (2)	47 007	5.1
8 Netherlands	26 800	2.9
9 Portugal	25 386	2.8
10 Czech Republic	18 366	2.0

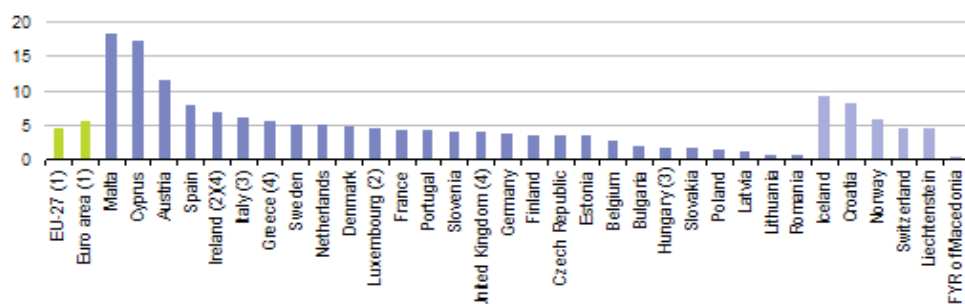
(1) Estimate made for the purpose of this publication, based on annual and monthly data.

(2) Estimate based on monthly data.

Source: Eurostat (online data codes: tour_occ_ninat and tour_occ_nim)

The number of nights (for resident and non-resident) may be seen in perspective, in relation to the size of the country population, thus obtaining an indicator of the strength of interest. According to this calculation, in 2010 the Mediterranean islands of Malta and Cyprus, as well as alpine destinations and cities of Austria were the favorite tourist destinations in the EU-27 (see Figure 4).

Figure 4 Intensity of tourism in 2010
(nights spent by residents and non-residents in collective tourist accommodation, per capita)



(1) Estimate made for the purpose of this publication, based on annual and quarter

(2) 2009.

(3) Provisional.

(4) Estimate based on monthly data.

Source: Eurostat (online data codes: tour_occ_ninat, tour_occ_nim and tps 00001)

5. The financial dimension of international tourism

The economic importance of tourism can be measured by analyzing the proportion of income from international tourism in relation to GDP. In 2010, this proportion was highest in Malta (13.2%) and Cyprus (9.5%), confirming the importance of tourism to these island countries (see Table 5), in Croatia, the proportion was even high (13.9%, data for 2009). In absolute terms, the largest international tourism earnings in 2010 were recorded in Spain (39 621 million) and France (34 939 million), followed by Italy, Germany and the UK.

Table 5: Income and expenses arising from travel, 2000-2010

	Receipts				Expenditure			
	(EUR million)			Relative to GDP, 2010 (%)	(EUR million)			Relative to GDP, 2010 (%)
	2000	2005	2010 (1)		2000	2005	2010 (1)	
EU-27 (2)	65 737	73 028	73 028	0.6	84 943	87 737	87 737	0.7
Belgium	7 934	7 761	7 761	2.2	12 047	14 151	14 151	4.0
Bulgaria	1 163	1 956	2 747	7.6	562	1 053	931	2.6
Czech Republic	3 232	3 769	5 043	3.4	1 387	1 940	3 074	2.1
Denmark	4 008	4 248	4 135	1.8	5 076	5 526	6 532	2.8
Germany	20 007	23 449	26 156	1.1	57 427	59 766	58 596	2.4
Estonia	549	784	815	5.7	221	353	460	3.2
Ireland	2 886	3 863	3 075	2.0	2 858	4 898	5 826	3.7
Greece	10 068	11 037	9 611	4.2	4 947	2 446	2 156	0.9
Spain	32 446	38 558	39 621	3.8	6 454	12 125	12 664	1.2
France	33 301	35 385	34 939	1.8	19 227	25 582	29 686	1.5
Italy	29 905	28 400	29 244	1.9	17 010	17 960	20 490	1.3
Cyprus	2 101	1 875	1 655	9.5	448	750	873	5.0
Latvia	143	279	480	2.7	268	475	485	2.7
Lithuania	424	742	778	2.8	274	599	594	2.2
Luxembourg	2 904	3 109	3 109	7.7	2 398	2 698	2 698	6.7
Hungary	3 758	3 300	4 049	4.2	1 508	1 908	2 241	2.3
Malta	640	611	813	13.2	218	216	348	5.6
Netherlands (3)	7 813	8 421	9 718	1.7	13 241	12 996	14 807	2.5
Austria	10 593	12 904	14 078	4.9	6 767	7 506	7 717	2.7
Poland	6 183	5 056	7 157	2.0	3 606	4 485	6 181	1.7
Portugal	5 720	6 199	7 610	4.4	2 422	2 454	2 953	1.7
Romania	391	849	859	0.7	463	747	1 239	1.0
Slovenia	1 039	1 451	1 743	4.9	554	708	905	2.6
Slovakia	519	972	1 729	2.6	372	660	1 534	2.3
Finland (3)	1 528	1 757	2 189	1.2	2 009	2 461	3 201	1.8
Sweden	4 414	5 970	8 392	2.4	8 718	8 672	10 149	2.9
United Kingdom	23 702	24 672	23 038	1.4	41 650	47 940	36 829	2.2
Iceland (4)	246	332	402	4.6	509	788	383	4.4
Norway (4)	2 110	2 680	2 909	1.1	4 812	8 187	8 871	3.3
Switzerland (4)	8 105	9 937	9 937	2.8	7 141	7 619	7 619	2.1
Croatia (4)	5 961	6 367	6 367	13.9	604	723	723	1.6
Turkey (3)	8 268	14 591	15 847	2.9	1 855	2 309	3 650	0.7
Japan (4)	3 656	10 018	7 397	0.2	34 548	30 229	18 051	0.5
United States (3)	106 045	82 043	101 907	0.9	72 589	58 934	62 712	0.6

(1) Provisional data.

(2) Extra EU-27 flows.

(3) 2010 estimated using quarterly data.

(4) 2009 instead of 2010.

Source: Eurostat (online data codes: bop_its_deth, bop_its_det, bop_q_c and nama_gdp_c)

Germany recorded the highest level of international tourism expenditure, which in 2010 accounted for 58 596 million EUR; it was followed by the UK (36 829 million) and France (29 686 million). When considering the costs to the size of the population, Luxembourg residents spent on average 5 374 EUR per capita for traveling abroad in 2010, Belgium ranked two, but at a considerable distance (1 305 EUR per capita), followed by Ireland, Denmark and Cyprus. Not surprisingly, these five Member States are relatively small and also handles some of the first places in the proportion of long trips (i.e. at least four nights) abroad to the total number of holiday travel.

6. Conclusions

In 2006 the European Commission adopted the Communication (2006) 134 "A Renewed EU Tourism Policy: Towards a Stronger Partnership for European Tourism". This paper has addressed a number of challenges that will influence the tourism in the coming years, including the aging population in Europe, increasing foreign competition, consumer demand in the more specialized tourism and the need to move to more sustainable and environmentally friendly practices in tourism. It is argued that touristic offer more competitive and sustainable destinations would help increase tourist satisfaction and strengthen Europe's position in the world's top tourist destinations. The document referred to was followed in October 2007 by Communication (2007) 621 'Agenda for a sustainable and competitive European tourism', which proposed actions related to sustainable management of destinations, integration by the companies of sustainability goals and the awareness of tourists about sustainability.

In June 2010 has been adopted Communication (2010) 352 'Europe, global tourist destination - a new political framework for tourism in Europe'. This notice was published following the entry into operation of the Lisbon Treaty, which recognized the importance of tourism - outlining specific EU competence in this area and allow decisions making by qualified majority. Specific Treaty article on tourism states that the EU "shall complement the action of Member States in the tourism sector, in particular by promoting the competitiveness of Union undertakings in that sector". By its communication of 2010, the European Commission encouraged a coordinated approach to tourism-related initiatives and defined a new framework for action to increase the competitiveness of tourism and its potential for sustainable growth. It proposed a number of European or multinational initiatives - including a consolidation of the tourism socio-economic knowledge - in order to achieve these goals.

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- Eurostat: Monthly data – nights spent at tourist accommodation establishments, 2008-2011
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- Eurostat: Tourism demand: domestic and outbound tourism (excluding day-trips) (tour_dem)