

OTIE

Osservatorio sul Turismo delle Isole Europee
Observatory on Tourism in the European Islands
Observatoire sur le Tourisme dans les Iles Européennes



EUROPEAN ISLANDS

1st Focus on tourism

2008



The Observatory on Tourism in the European Islands (OTIE) founded in Sicily in 2007 is a non-profit organization with a public body, with the aim to promote new research studies and share the results among the European Islands.

OTIE's mission is to offer to the local decision makers new policies and new strategies in developing innovative tourisms in the EU islands.

OTIE's activities include the creation of a constantly updated tourism statistics databank, the publication of an annual report on tourism, and the organization of tourism forums and seminars.

Through a direct dialogue with the principal decision makers of tourism in the islands the Observatory offers support for planning marketing policies and local tourism strategies.

OTIE cooperates with public organizations, local institutions, Universities, Research centers and enterprise associations involved in the tourism field.

Sources:

| | |
|-----------------|---|
| Cyprus | CYSTAT – Statistical service of the Republic of Cyprus |
| France | Chambre de Commerce et d'Industrie de Bastia et de la Corse du Nord Chambre de Commerce et d'Industrie de La Réunion Communauté territoriale Corse Direction du Tourisme - Ministère de l'Economie, de l'Industrie et de l'Emploi IEDOM - Institut d'émission des départements d'Outre-Mer INED - Institut national études démographiques INSEE - Institut national de la statistique et des études économiques |
| Greece | NNSG – National Statistical Service Of Greece |
| Italy | APT di Foggia - Ufficio Statistica APT di Latina - Ufficio Statistica APT di Livorno - Ufficio Statistica EPT di Napoli - Ufficio Statistica ISTAT - Istituto nazionale di statistica Provincia di Siracusa - Ufficio Statistica Regione Sardegna - Osservatorio Economico Regione Siciliana Assessorato Turismo - Osservatorio Turistico |
| Malta | NSO - National Statistics Office |
| Portugal | Direcção Regional De Estatística Maderia INE - Instituto Nacional de estatística Observatório Regional do Turismo Açores |
| Spain | INESTUR - Instituto d'Estratègia Turísticas Instituto Canario de Estadística |

European Islands: 1st Focus on tourism, 2008

This publication shows the main dimensions of tourism in 24 EU islands, representing 7 Countries. The data analyzed was provided by national statistical institutes and regional tourist offices.

Islands are classified by area, where we distinguish large, medium, small and micro islands, and by population density – from high to low.

From a tourist supply point of view hotels and similar establishments are present in all of islands, denoting an hospitality system connected to traditional establishments.

The no-hotel establishments are more concentrated than hotels. In fact, only 5 of 24 islands have a higher percentage of beds referred to no-hotel accommodations especially in Corsica, where this value reaches the 80%.

The number of beds is different in each island and varies from 466 beds/km² in the Campanian Islands to 4 beds/km² in the Azores and Reunion.

The large islands have lower values, showing a supply that could increase.

Comparing the number of beds to local population, the lowest value is in Reunion island, where there is one bed per inhabitant. The supply in the Azores and French overseas islands is low, too. Among large islands, Sardinia has almost triple as many beds as Sicily.

The occupancy rate compared to the accommodation is different for each island, but only in 4 archipelagos: Malta, Balearic Islands, Madeira, Reunion, this rate reaches more than 50%.

In the other islands the occupancy rate is less than 40%, except for Cyprus. In the Cyclades and Argosaronicos islands, in 2007, the rate was less than 10%.

From a demand point of view, results shown that the Spanish islands are tourists favorite destinations. While the length of stay is greater in Reunion. The stay in the greater part of the European islands falls in the medium stay, between 4 and 7 days and only 5 of the islands are tourist destinations for short stay, mostly a week-end.

The tourism impact doesn't have a deteriorative effect on the culture or environment in 73% of the islands.

In all the islands tourism has a highly seasonality occurrence. This is especially true for those islands where tourism is concentrated in the summer months. However, the situation in Atlantic Coast Islands is different, because they do not show this seasonality variation.

From 2003 to 2007 tourism showed changes. Arrivals increased in all the islands and the overnight stays had a different trends in each island. Comparing the 2006 with 2007 data, the results were different. In fact, tourist arrivals increased in Reunion and decreased in Corsica, Pontine Islands and Tuscan Islands. In all the islands the overnight stays decreased.

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Note: Some data about French overseas islands has been not available at moment. That's why in some figures they're not included.

Geo-demographic issues of European Islands, 2007

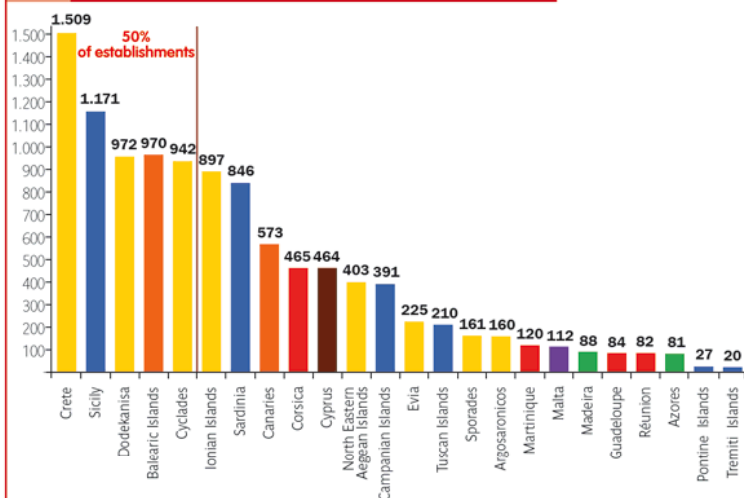
| Islands | | | Area Km² | | Islands | | Density | |
|---------|------------------------------|--------|------------------|--|------------------------------|-------|--------------|--|
| Large | Sicily | 25.703 | 1 st | | Campanian Islands | 1.402 | High density | |
| | Sardinia | 24.090 | 2 nd | | Malta | 1.299 | | |
| Medium | Cyprus | 9.251 | 3 rd | | Martinique | 353 | | |
| | Corsica | 8.680 | 4 th | | Pontine Islands | 351 | | |
| | Crete | 8.261 | 5 th | | Réunion | 322 | | |
| | Canaries | 7.447 | 6 th | | Madeira | 308 | | |
| Small | Balearic Islands | 4.968 | 7 th | | Canaries | 272 | | |
| | North Eastern Aegean Islands | 4.260 | 8 th | | Guadeloupe | 238 | | |
| | Evia | 3.662 | 9 th | | Balearic Islands | 207 | | |
| | Réunion | 2.504 | 10 th | | Argosaronicos | 202 | | |
| | Ionian Islands | 2.443 | 11 th | | Sicily | 196 | | |
| | Dodekanisa | 2.393 | 12 th | | Tremiti Islands | 157 | | |
| | Azores | 2.322 | 13 th | | Tuscan Islands | 120 | | |
| | Cyclades | 2.267 | 14 th | | Azores | 105 | | |
| | Guadeloupe | 1.703 | 15 th | | Ionian Islands | 94 | | |
| | Martinique | 1.128 | 16 th | | Cyprus | 85 | | |
| Micro | Madeira | 801 | 17 th | | Dodekanisa | 82 | Low density | |
| | Sporades | 417 | 18 th | | Crete | 73 | | |
| | Malta | 316 | 19 th | | Sardinia | 69 | | |
| | Argosaronicos | 261 | 20 th | | Evia | 56 | | |
| | Tuscan Islands | 261 | 21 st | | Cyclades | 49 | | |
| | Campanian Islands | 61 | 22 nd | | North Eastern Aegean Islands | 47 | | |
| | Pontine Islands | 11 | 23 rd | | Sporades | 37 | | |
| | Tremiti Islands | 3 | 24 th | | Corsica | 32 | | |

The population density is lower in the Eastern Mediterranean area and higher in the Campanian Islands and Malta.

The population data of Greek islands for 2007 have been estimated (NSSG). For the Sporades and Argosaronicos Islands the last population data go back to 31st December 2001.

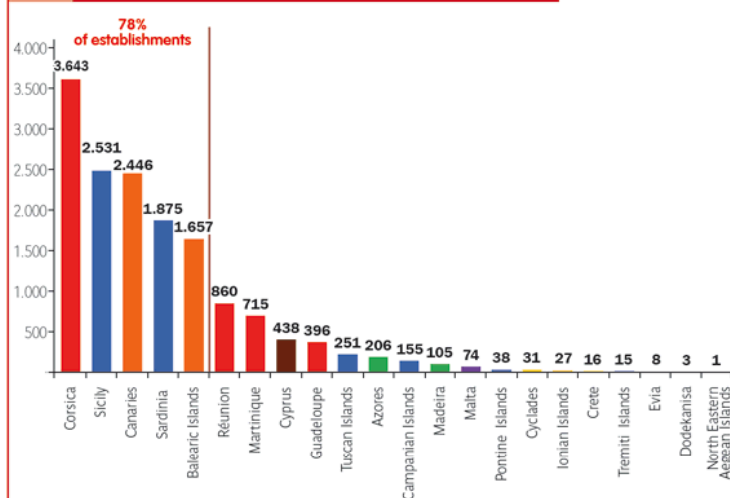
Tourist supply in the European Islands, 2007

1 Number of hotels and similar establishments, 2007



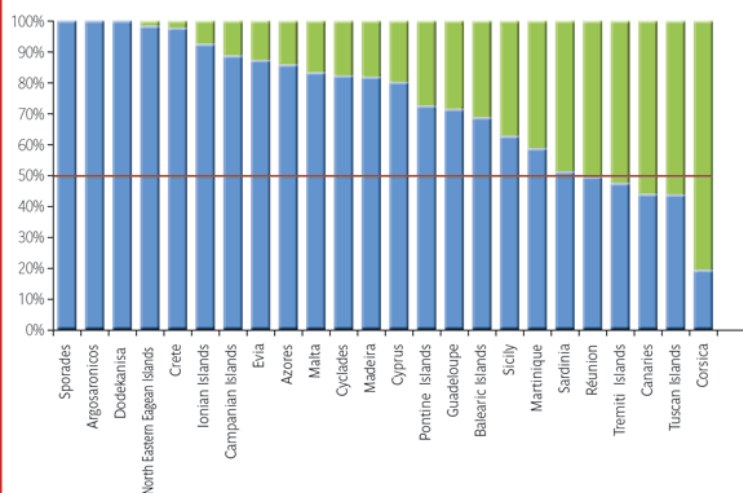
50% of hotels and similar establishments is concentrated in 5 out of 24 islands.

2 Number of no-hotel establishments, 2007



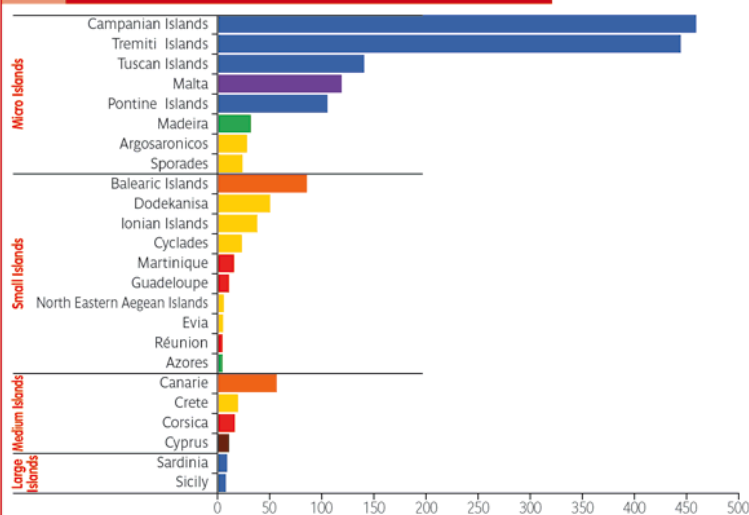
78% of no-hotel establishments is concentrated in 5 out of 24

3 Beds for type of establishments (%), 2007



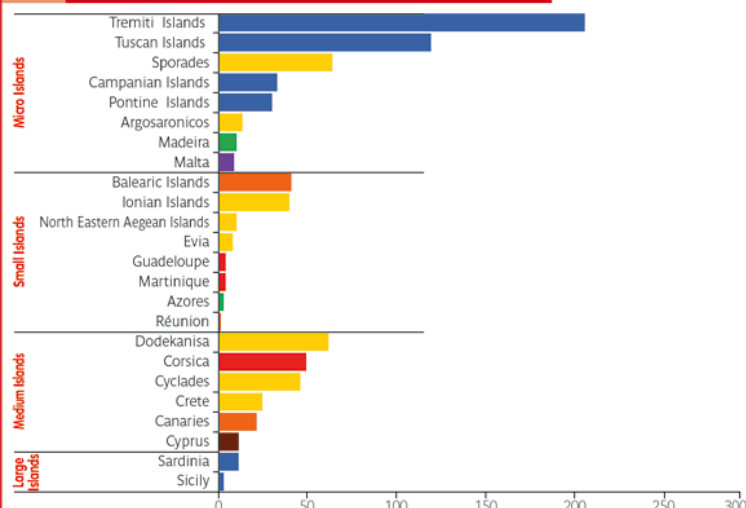
In the Greek islands the supplementary tourist accommodation supply is almost absent and this contrasts with Corsica.

4 Index territorial density, 2007 (Beds/area)



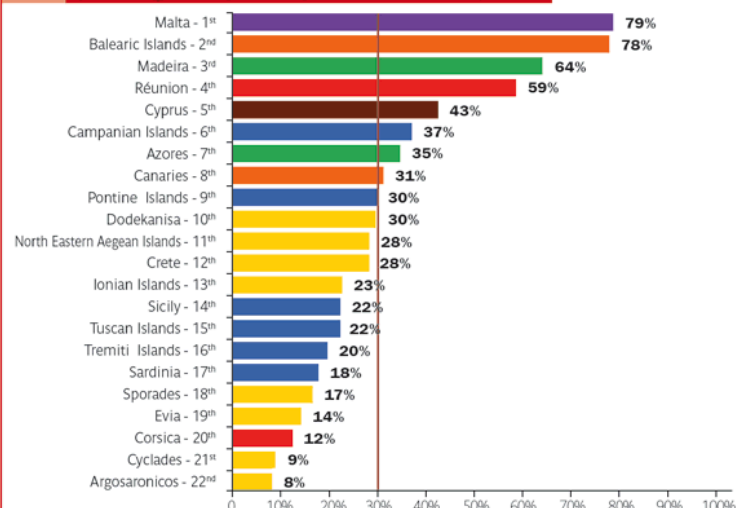
In the large Islands there are less than 10 beds per 1 km².

5 Tourism function index, 2007 (Beds/population)



The greatest number of beds per inhabitant is noted in two Italian micro-islands, the Tremiti Islands and Tuscan Islands.

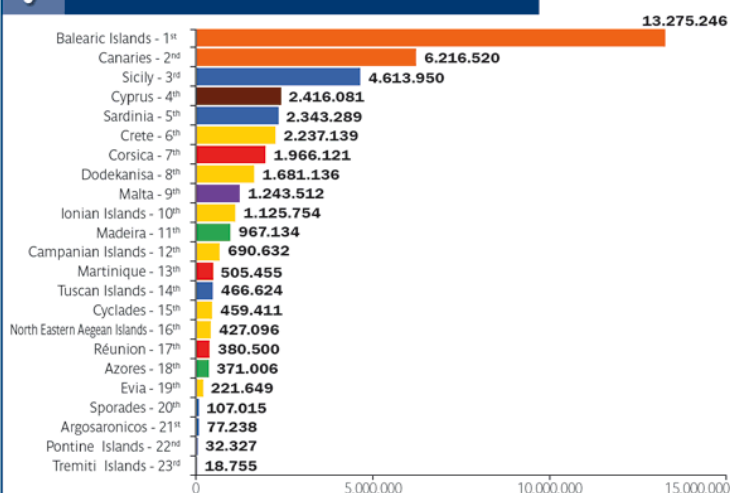
6 Bed occupancy rate, 2007 [Overnight stays/(bedplacesx365)x100]



In 64% of the islands the bed occupancy rate does not exceed 30%.

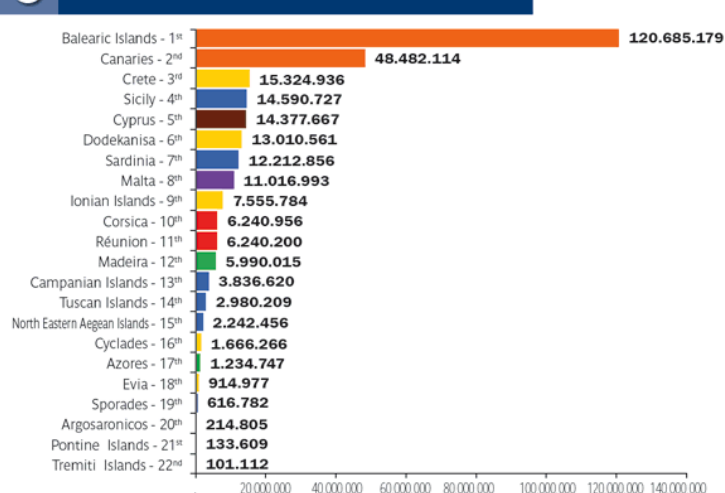
Tourist demand in the European Islands, 2007

7 Tourist arrivals, 2007



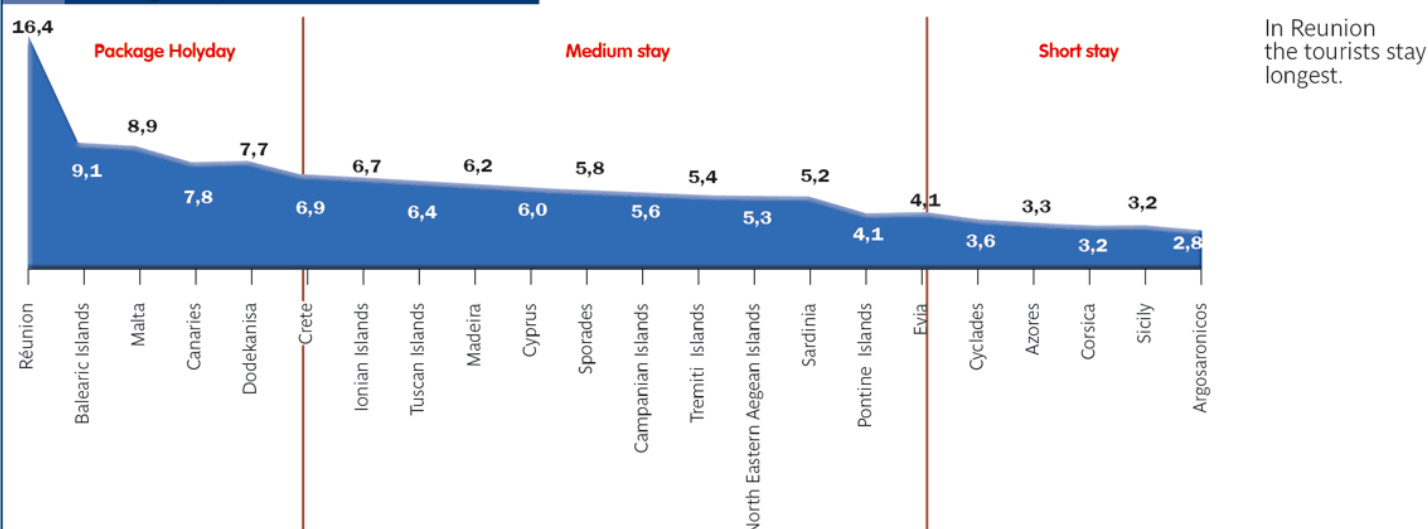
3 out of 23 islands attract more than 24,000,000 tourists and almost 50% of these arrivals are recorded in the Balearic Islands.

8 Overnight stays, 2007



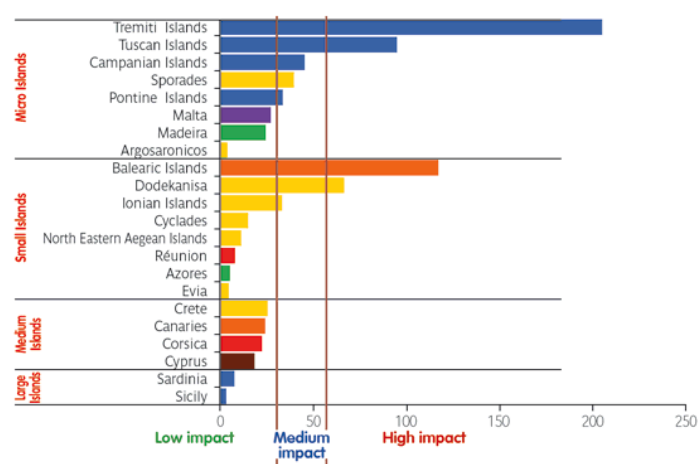
2/5 of total overnight stays are recorded in the Balears.

9 Length of stay, 2007 [Overnight stays/tourist arrivals]



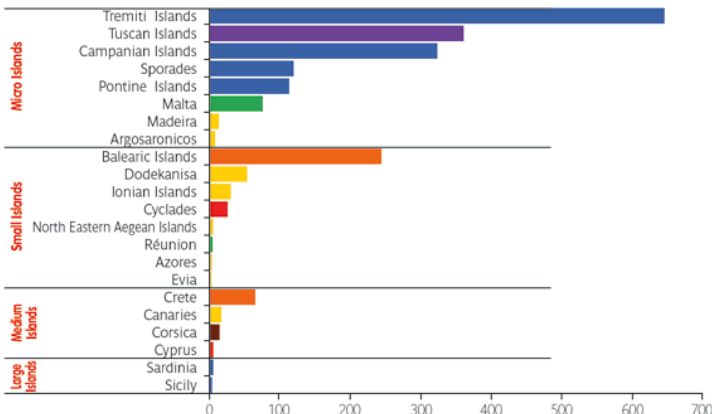
In Reunion the tourists stay longest.

10 Environmental Impact Index, 2007 [(Overnight stays/population)]



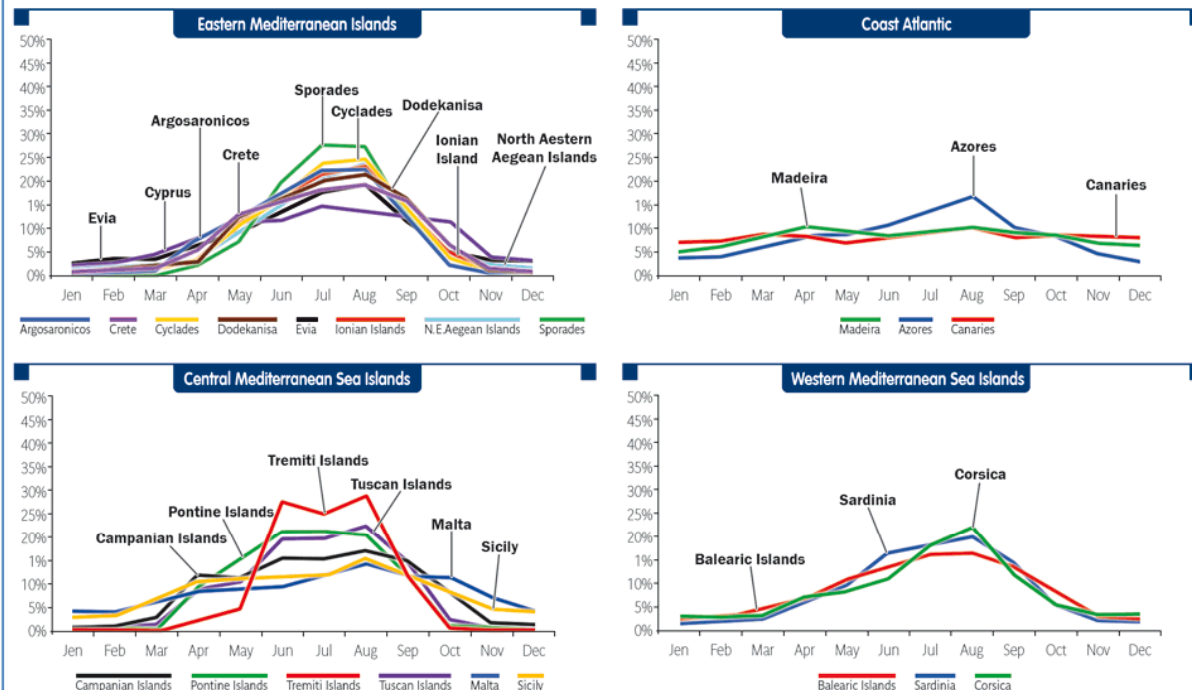
The environmental impact is low in 73% of the islands.

11 Tourist pressure, 2007 [(Overnight stays+population)/area]



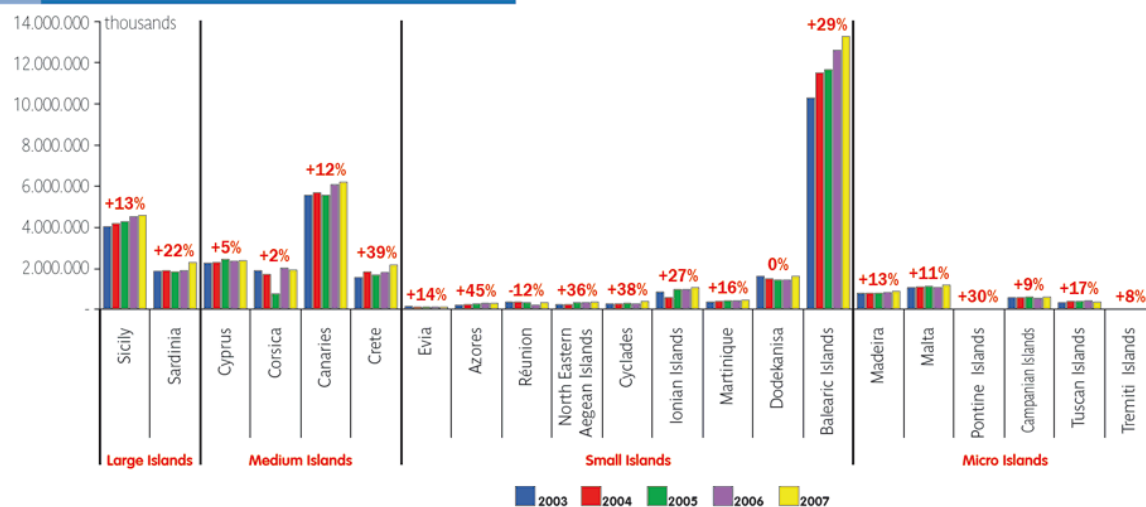
The supply of bed-places has different percentages according to the different type of accommodation, except for the Greek islands, where the overall supply is due to hotels and similar establishments. Only 5 out of 24 islands have a higher percentage of bed-supply referred to the other collective accommodation establishments and especially in Corsica, where this value reaches the 80%.

12 Seasonality, 2007



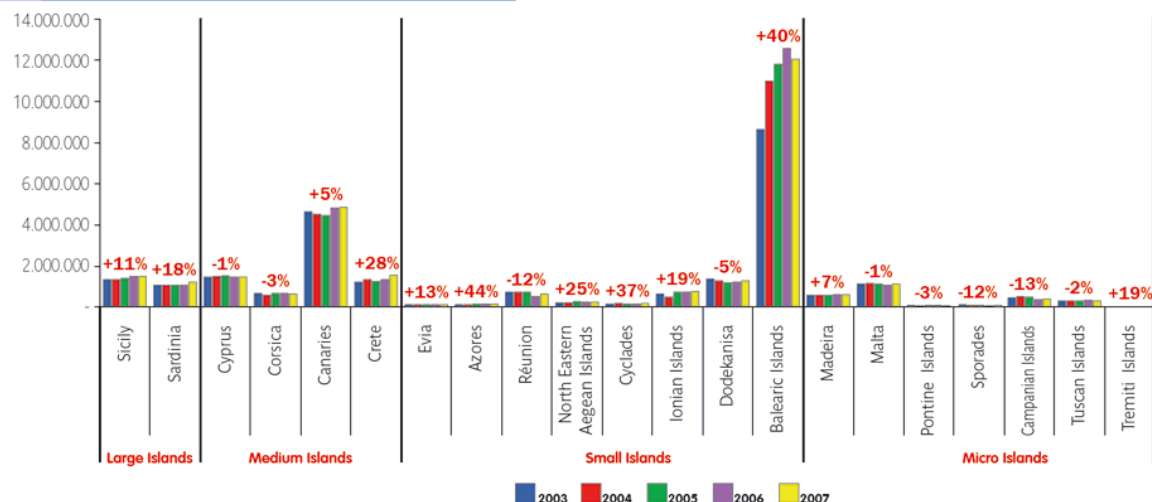
Among the eastern Mediterranean islands only in Cyprus are tourist arrivals more evenly distributed throughout of the year. In the central Mediterranean area tourist flows are concentrated from April to September. In the western Mediterranean the peak seasonal month is in August. In the Atlantic Coast Islands there is a low seasonality change.

13 Tourist arrivals 2003-2007



From 2003 to 2007 an increase of tourist arrivals has occurred in all the islands and only the Reunion there has been a decrease.

14 Overnight stays 2003-2007 (data expressed in thousands)



The best result have been recorded in the small islands, the poorest in the micro-islands.

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