

OTIE

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

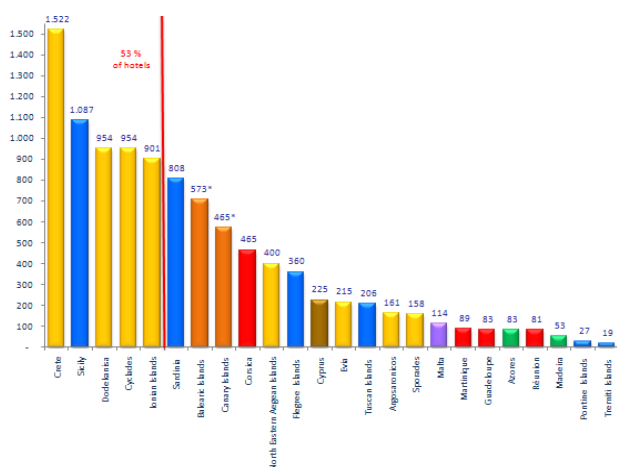


EUROPEAN ISLANDS

2nd Focus on tourism

2010

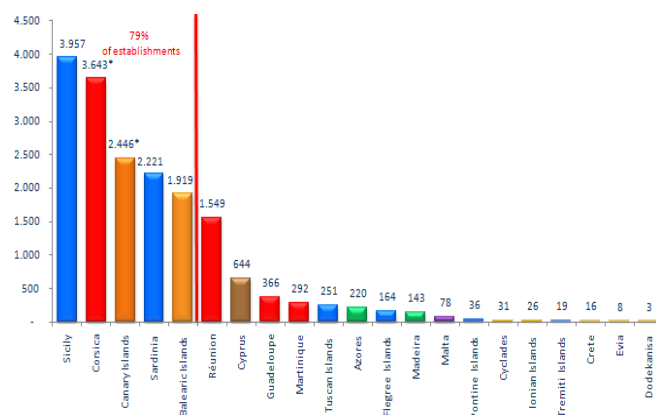
Number of hotel, 2008



More than a half of hotel accommodation facilities gathers in five insular contexts

*The data for Corsica and Canaries are available at 31.12.2007

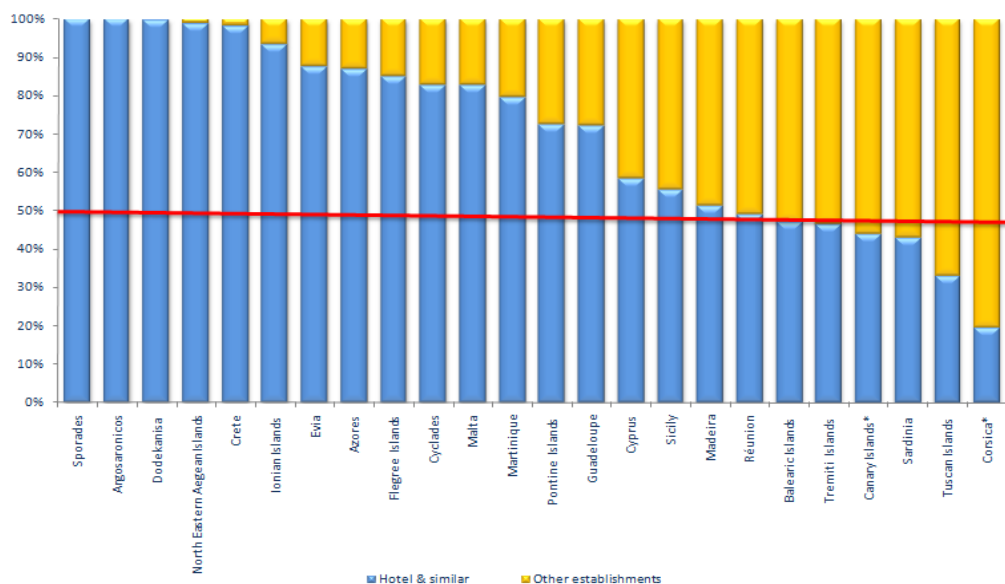
Number of no-hotel, 2008



Five insular contexts have 80% of the facilities available

*The data for Corsica and Canaries are available at 31.12.2007

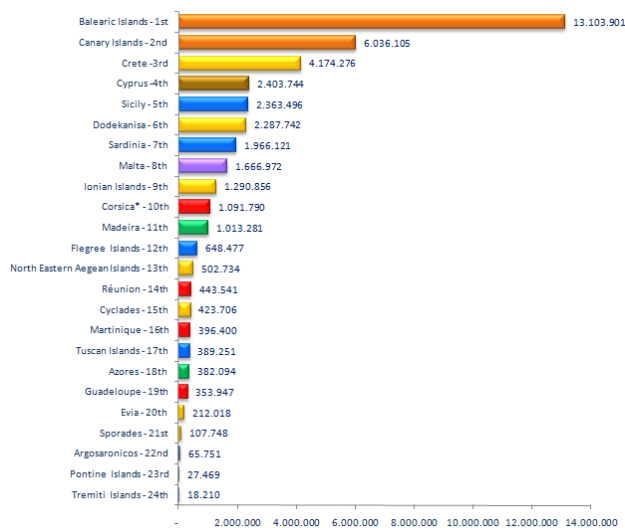
Beds per accommodation typology, 2008



In terms of beds, other accommodation facilities represent the main accommodation typology (56%)

*The data for Corsica and Canaries are available at 31.12.2007

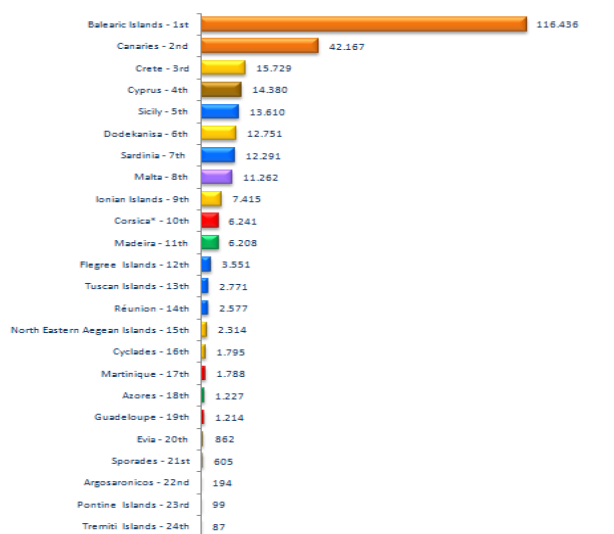
Arrivals, 2008



About one third of overall arrivals concerns Balearic Islands. These are followed by Canaries Islands and Sicily hat together, nevertheless, report 2 million arrivals less than the Spanish archipelago

*The data for Corsica are available at 31.12.2007

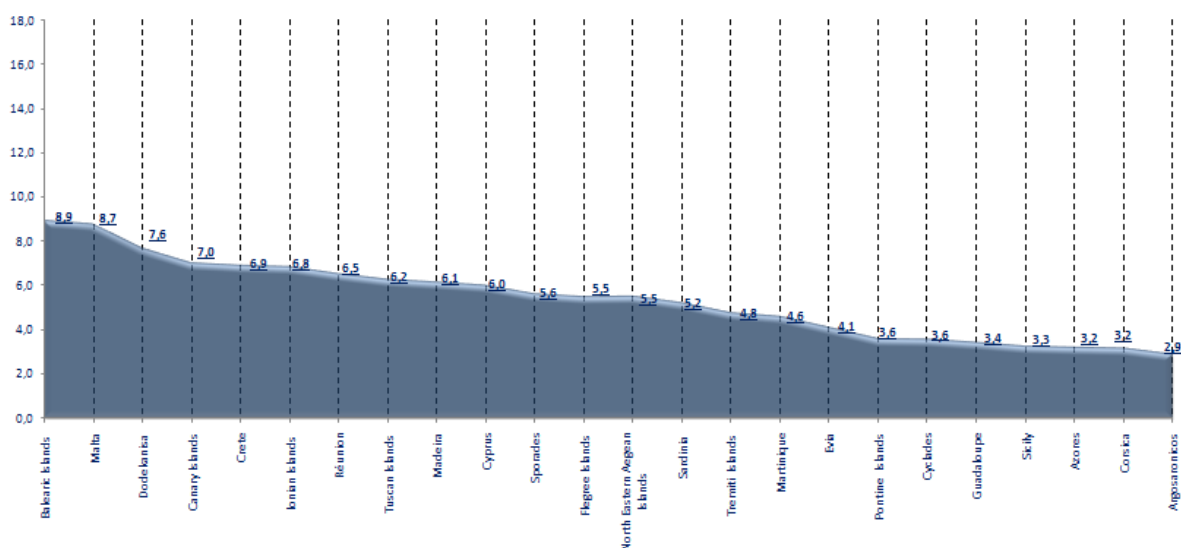
Overnight stays (000), 2008



Balearic islands alone receive the 42% of overall

*The data for Corsica are available at 31.12.2007

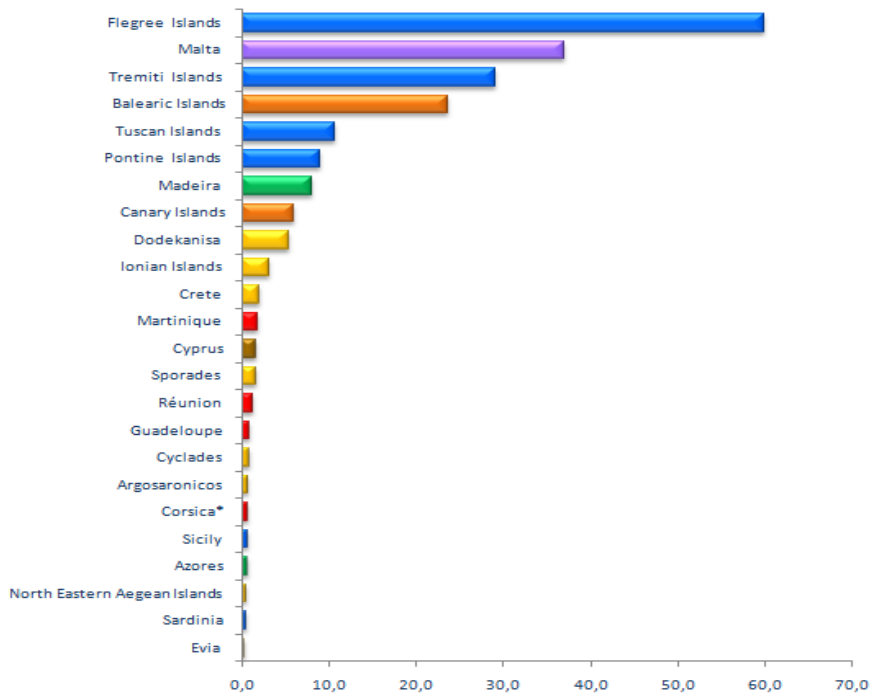
Average stay, 2008



Middle and long term holidays prevail. In particular, 83% of islands register an average stay between 3 and 7 days and 13% a stay that is more than 7 days long.

*The data for Corsica are available at 31.12.2007

Tourist pressure, 2008

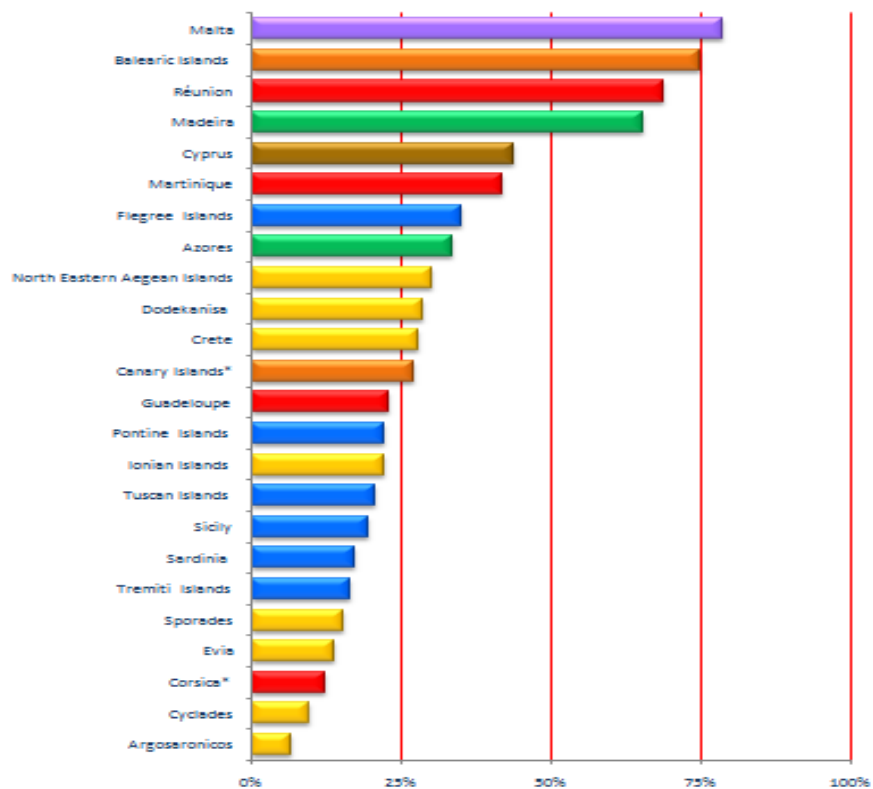


Flegree islands, Tremiti islands and Malta are the insular contexts in which the contemporary presence of tourists and residents exerts the biggest pressure on the territory

*The data for Corsica and Canaries are available at 31.12.2007

Bed occupancy rate, 2008

15 islands on 24 have a beds occupation rate inferior than 30%. The primacy of beds occupation, on the contrary, belongs to the Malta (79%) and Balearic islands (75%)



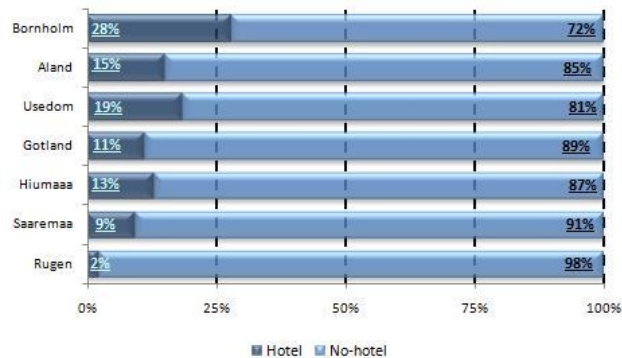
*The data for Corsica and Canaries are available at 31.12.2007

Focus on the Baltic Islands

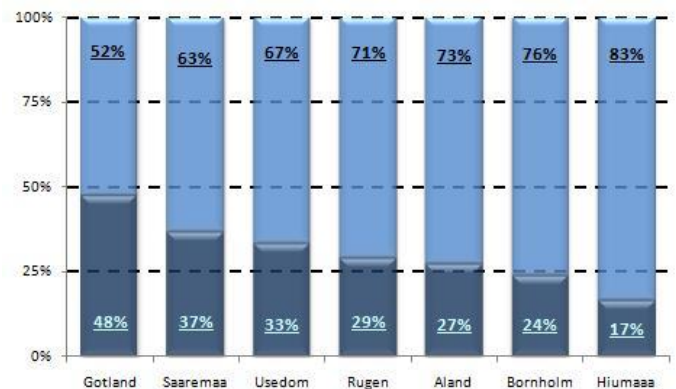
Denmark Sweden Finland Germany Estonia

Tourist supply 2008

Type of establishment(%), 2008



Beds for type of establishment (%), 2008



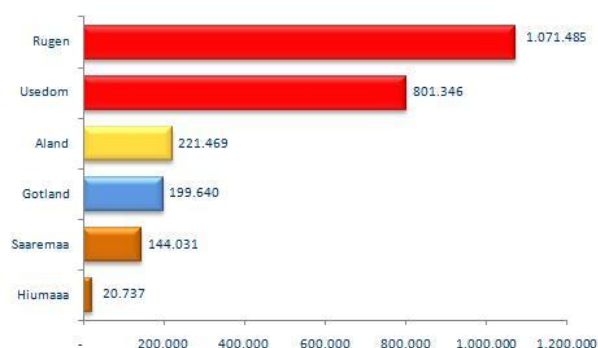
No hotel accommodation facilities typology prevail all over the islands

Most of beds is not offered by hotels but by other accommodation facilities. The offer ranges from 52% of Gotland to 83% of Hiumaa

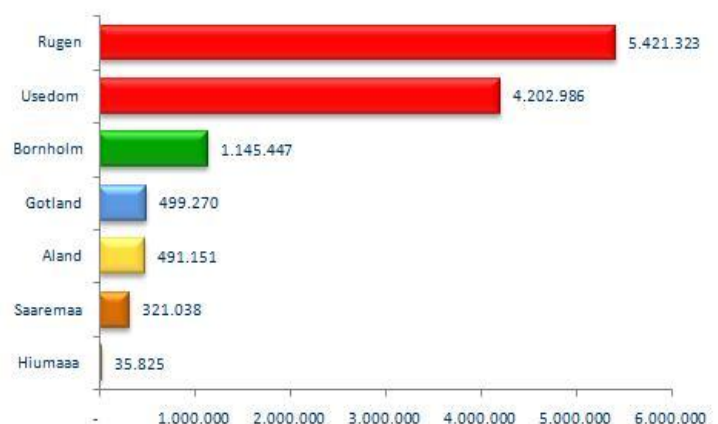
Denmark Sweden Finland Germany Estonia

Tourist demand 2008

Tourist arrivals, 2008



Overnight stays, 2008



In 2008 Baltic Islands registered about 2 million and a half arrivals. Such fluxes concern mainly 2 Islands: Rugen (44%) and Usedom (33%)

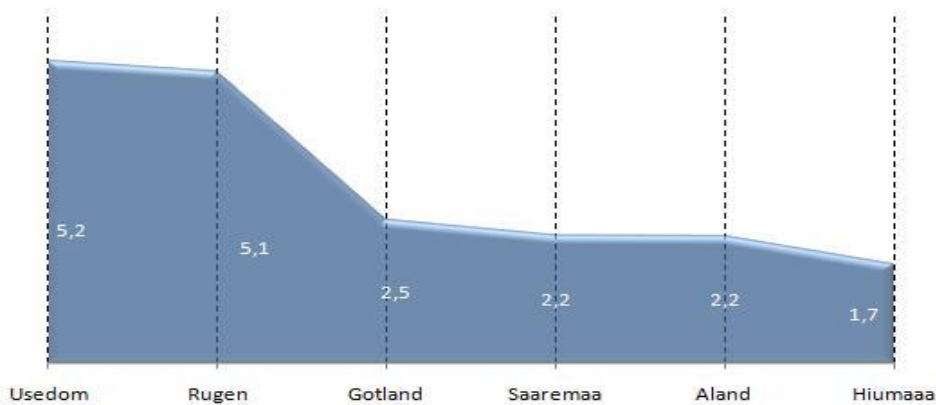
Rugen (44,7%) and Usedom (33%) confirm to be the main holiday destination among Baltic Sea islands, with the highest number of overnights.

Focus on the Baltic Islands

Denmark Sweden Finland Germany Estonia

Tourist demand 2008

Average stay, 2008

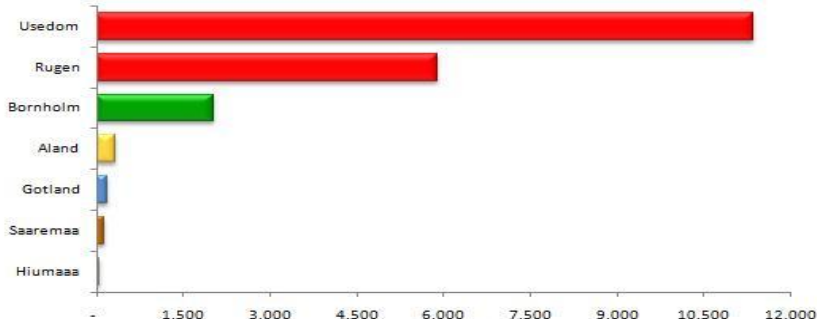


Only Rugen and Usedom represent holiday destinations reporting average stays of 5 days. Other islands, instead, are goal for short breaks (<3 days).

Denmark Sweden Finland Germany Estonia

Indicators of tourist flow 2008

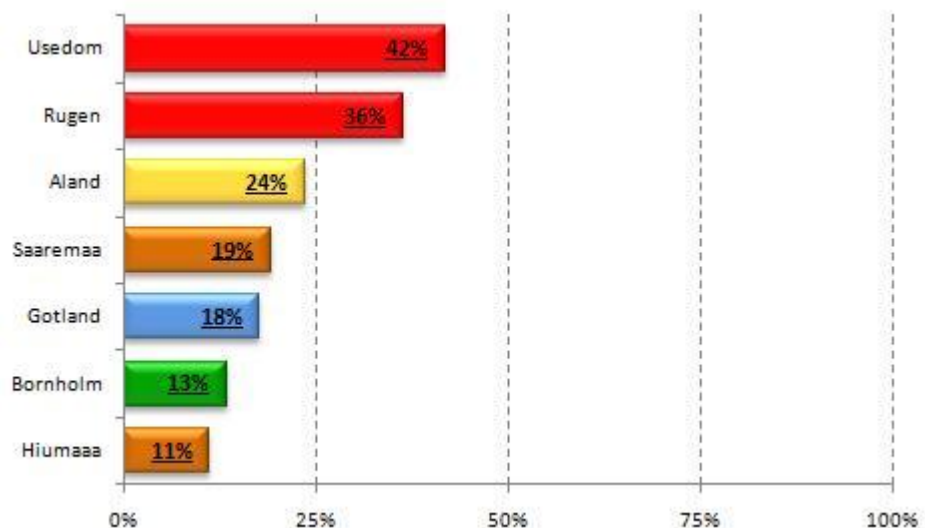
Tourist pressure, 2008



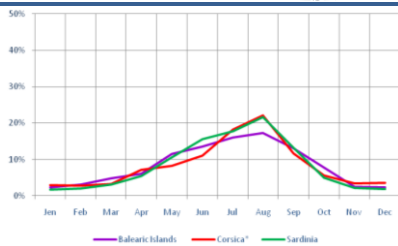
The contemporary presence of tourists and residents exerts the biggest pressure on the territory of Usedom and Rugen.

Bed occupancy rate, 2008

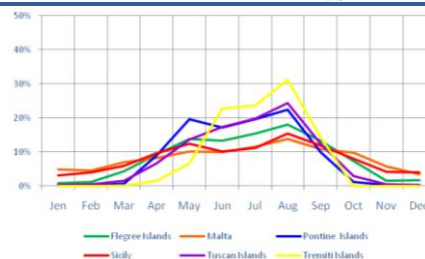
Beds occupation rate does not overcome the 42% nevertheless with meaningful differences among the several insular contexts.



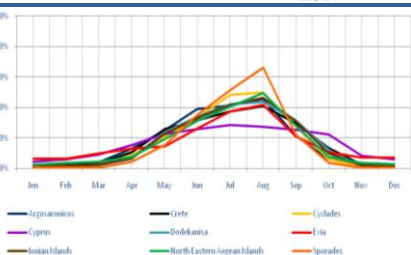
West Mediterranean Islands



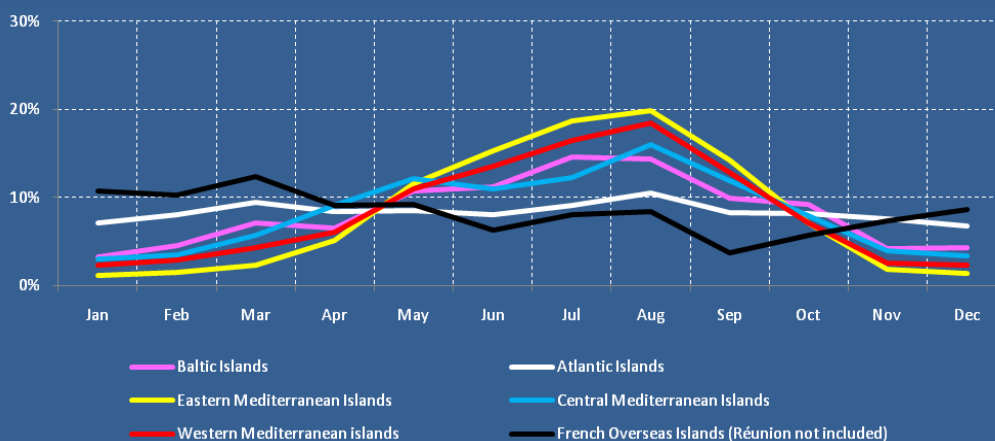
Central Mediterranean Islands



East Mediterranean Islands

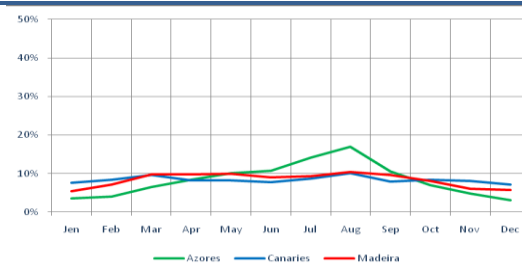


SEASONALITY 2008

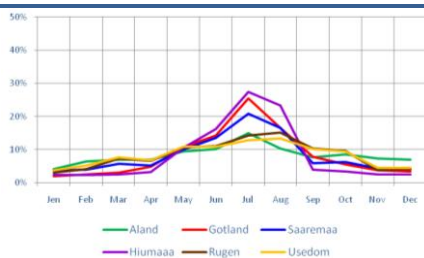


Except Atlantic and French Over-Sea Islands, that present a fluxes distribution basically regular throughout the year, in the other insular contexts one can notice a peak in arrivals during summer months.

Atlantic Coast Islands



Baltic Islands



French Overseas Islands





The Observatory on Tourism in the European Islands (OTIE) has the principal objective to realize statistic studies and documents of research in order to identify current issues of Tourism in the European Islands.

On the 2nd February of 2007, the OTIE was successfully founded in Palermo, where the Head Office is located. It's a non-profit making association, constituted by public institutions, Universities, Research Centres and other international organizations of 7 UE insular countries (Italy, Spain, France, Portugal, Greece, Malta e Cyprus). The observatory aims to realize new researches and studies about UE islands, sharing objectives, results and policies with the main governments and local administrations. OTIE concentrates its activities on the updating of the Databank on Insular Tourism, on the running of the Documentation Centre of the Islands, on the realization of studies and researches, on the organization of forum and seminars, and on the participation to European projects of cooperation and social development. Thanks to the direct dialogue with the institutions, companies and research centers on tourism OTIE offers to the insular realities a support to devise strategic, operative and marketing plans on tourism because it has a wide network of contacts and a steady updated benchmark on European tourism.

DATA SOURCE

Cyprus	Statistical service of the Republic of Cyprus – CYSTAT
France	Agence du Tourisme de la Corse – ATC Institut National de la Statistique et des Etudes Economiques – INSEE
Greece	National Statistical Service of Greece – NSSG
Italy	Azienda di Promozione Turistica – APT di Foggia – Ufficio Statistica Azienda di Promozione Turistica – AP T di Latina – Ufficio Statistica Azienda di Promozione Turistica – APT di Livorno – Ufficio Statistica Ente Provinciale per il Turismo – EPT di Napoli – Ufficio Statistica Istituto nazionale di statistica – ISTAT Regione Sardegna – Osservatorio Economico Regione Siciliana Assessorato Turismo – Osservatorio Turistico
Malta	National Statistics Office – NSO Direcção Regional De Estatística Maderia
Portugal	Instituto Nacional de Estatística – Statistic Portugal - INE Observatório Regional do Turismo Açores
Spain	Instituto d'Estratègia Turísticas – Illes Balears – INESTUR Instituto Canario de Estadística – ISTAC Instituto Nacional de Estadística – INE
Estonia	Statistical Office of Estonia – ESA
Sweden	Statistics Sweden – SCB
Finland	Statistics Finland Statistics and Research Åland
Denmark	Statistics Denmark
Germany	Statistisches Bundesamt Deutschland Statistisches Amt Mecklenburg-Vorpommern

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Text translation: Elina Messina

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