

# VULNERABILITY OF EUROPEAN OUTBOUND TOURISM MARKETS IN THE MIDST OF THE GLOBAL FINANCIAL CRISIS

*Area of Statistics and Market Research (SAETA), an arm of Turismo Andaluz, S.A., and the University of Malaga, specifically Research Group SEJ314 (Research Project to Study the Behaviour of Outbound Tourism Markets).*

## 1. Introduction

The worst economic slowdown in recent history and its effect on European tourism consumer markets have been the subject of market research of the Regional Government Ministry of Tourism, Trade and Sport of the Junta of Andalucía.

The tourism sector's ability to recover from the economic situation depends largely on its reaction time. Thus, information tools that can identify current changes in trends are invaluable aids to decision-making and to preserving a competitive edge in the sector.

Specifically, the information most needed in a crisis environment is which outbound tourism markets hold the most promise and which do not.

This study aims to answer precisely that question, identifying the European countries of greatest interest because of their tourism behaviour in this crisis, as well as those in which Andalusia boasts a competitive position.

In this time of crisis, promising outbound tourism markets have two characteristics:

- They are less vulnerable to the economic crisis and their tourism behaviour is largely unaffected, thus making them stable tourism markets. We are not talking about outbound markets which enjoy a good economic climate, but to those which, regardless of the economic climate, have witnessed few changes in their tourism behaviour.
- In addition, they are attractive target markets, cost-effective and profitable. An outbound tourism market appeals to a destination if it helps that destination achieve its goals, by exerting a multiplier effect, generating income, or reducing seasonal variation, for example. To be attractive, a market should also:
  - be large enough to be cost-effective and profitable;
  - be accessible, easy to reach, and a likely consumer of what Andalusia has to offer, meaning not only that good travel connections should exist between the market and the destination, but also that the culture of the market country and its laws governing vacation time or international travel should support movement of people abroad, etc;
  - have a level of demand commensurate with the destination's supply and service capability; and
  - be tenable, which is to say that we can hold an interesting position and defend it against competing travel destinations.

Four tasks were central to the analysis carried out in the study, and this report dedicates a separate section to each of them:

- The first task was to determine **the most suitable variables** to use in identifying the most promising and least vulnerable outbound tourism markets for Andalusia in a time of crisis, and

to select the methodology to be used. The Methodology section of this report describes and justifies the criteria and processes adopted in market selection.

- The second task was to identify those European countries **least vulnerable** to the economic crisis. This involved analysis of economic, sociological and tourism-related variables to get an overview of each country's situation.
- The third task was to identify the European countries **most promising as tourism consumers**. To do this, we analysed the characteristics that make an outbound tourism market a good target market for Andalusia.
- The fourth task was to select European **target markets for Andalusia in the current crisis**. The corresponding section of this report includes the results of the study.

The final section of the report summarises the strengths and weaknesses of Andalusia's target markets and contains the main conclusions of the study.

The markets studied are 25 of the 27 countries belonging to the European Union: Belgium, Bulgaria, Czech Republic, Denmark, Germany, Estonia, Greece, Spain,<sup>1</sup> France, Italy, Cyprus, Latvia, Lithuania, Luxembourg, Hungary, Netherlands, Austria, Poland, Portugal, Romania, Slovenia, Slovakia, Finland, Sweden and United Kingdom.<sup>2</sup>

Sources of the 2009 data:

- The Statistical Office of the European Commission (Eurostat) is the reference for all the indicators studied. In particular, the Flash Eurobarometer No. 258 'Attitudes of Europeans towards Tourism', a survey, published in March 2009.

- The World Tourism Organisation (WTO), National Statistics Institute (INE) and Spanish Airports and Air Navigation (AENA) were additional sources consulted.

Lastly, it should be noted that this investigation was carried out within the framework of the agreement between Turismo Andaluz, S.A., an arm of the Regional Government Ministry of Tourism, Trade and Sport of the Junta of Andalusia, and the University of Malaga, specifically Research Group SEJ314 (Research Project to Study the Behaviour of Outbound Tourism Markets).

## 2. Methodology

To achieve our goal, we first had to settle on a methodology that could help us identify 'healthy outbound tourism markets' for Andalusia.

First and foremost, the methodology selected had to be able to produce a clear, confidence-inspiring ranking of the outbound tourism markets least vulnerable to the economic crisis. In other words, it had to be able to provide clear measures about the situation of each market. This required special care in the selection of variables to be used and in the way we worked with them.

In addition, the methodology had to be:

- Quick to implement, allowing us to work with secondary sources and eliminating the need for ad hoc field work, which might provide much more specific information but which is by nature slow and sporadic.

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<sup>1</sup> This category took into account domestic tourism, since most of Andalusia's tourism (63.1% in 2009) involves Spaniards who travel there from other parts of Spain.

<sup>2</sup> Malta and Ireland are not included in the study because there is not enough information for many of the indicators.

- Easy to understand. One must remember that the information is destined for use by the entire Andalusian tourism sector, which has no reason to be familiar with statistical processes. This was the primary consideration in choosing the method to be used to select markets of interest.

Given the need for clear, confidence-inspiring ranking, quick implementation and results that are easy to understand, it was clear that the research would involve three distinct steps:

1. selecting the variables which explain the situation (or climate) in each country;
2. selecting the working method; and
3. analysing the results.

In this section, we will look at the first two steps, leaving the third to be addressed in subsequent sections of the report.

#### 1. Selecting the variables which identify the situation in outbound tourism markets

Given our goal, the variables selected needed to yield a picture of the state of the economy and the state of tourism in a given country and to elucidate its tourism behaviour in this time of economic instability. Furthermore, to the extent possible, some variables of a predictive nature, needed to be included, in order to see not just what the situation is today but also what it could be tomorrow. Finally, the variables selected needed to permit information to be gleaned from available secondary sources, thus ensuring that optimal markets could be identified in a quick and timely manner.

On the other hand, since what we wanted to learn was the suitability of countries as markets for Andalusia, we also had to consider another group of variables, those identified in the literature as useful in determining a country's suitability as a target market (Munuera, J. L. and Rodríguez, A. I., 1998<sup>3</sup>).

We compiled a lengthy list of variables which we then pared down. We eliminated those variables for which data was either hard to get or would come from sources not deemed reliable, as well as those which duplicated information. That left us with the following variables:<sup>4</sup>

- propensity to travel;
- willingness to spend on tourism;
- real GDP;
- unemployment rate;
- economic conditions;
- planned trips and/or vacations for the coming year;
- changes of destination;
- change in travel decisions;
- number of outbound travels for Spain;
- spending on international travel;
- travel rate;
- number of direct flights to Andalusia;
- proximity to the destination in conjunction with good highway connections; and
- Spain's ranking as a tourist destination.

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<sup>3</sup> Munuera J.L. and Rodríguez A.I (1998): "Marketing estratégico". Ed. Pirámide, Madrid

<sup>4</sup> Definitions and calculation methodologies are detailed both in the main text and in the Appendix.

## 2. Selecting the working method

The working method, like the variables, had to comply with our basic requirements. Specifically:

- It had to be **easy to understand**, so we opted to work with statistical methods that are easy and descriptive and to represent the results in a very visual way.
- It had to **capture change more than static conditions** since the objective was to identify how outbound tourism markets are responding. In other words, for certain variables we needed to work with rates of behaviour or behavioural trends.
- It had to **give precedence to the outbound tourism markets which showed the best behaviours** across the board. That is to say, we were interested not in countries' aggregate mean scores but in their order of excellence. Thus, a market which was outstanding in just one variable but weak in others was penalised. The markets selected had to rank high, with good scores across the variables.

This led us to choose the method of comparative ranking. Countries were ranked from least vulnerable to most vulnerable in each of the indicators utilised. Then we added up the number of times each country was among the best 12. Why 12? Using that number ensured that the United Kingdom, Andalusia's primary tourist market, was included.

A good outbound tourism market for Andalusia in a time of economic crisis should have two characteristics. It should be stable in its tourism behaviour despite the crisis and it should be a promising target market. To choose our markets, we analysed each of these characteristics separately, then identified those which scored well in both, confident that they would be Andalusia's best outbound tourism markets.

## 3. Identifying the least vulnerable European outbound tourism markets in the current economic crisis

The first step was to assess the vulnerability of the European markets during the deep recession of 2009. To do that, we selected indicators that show whether a market is more or less promising, taking into account tourism, economic climate, and sociological factors – three areas key in identifying the climate in a market.

Given the availability of information and the need to compare it across countries for the time period in question, the following indicators were chosen to measure the vulnerability of the various markets:

### Tourism indicators

**Propensity to travel.** The aim here was to identify trends in a country's travel rate, defined as the relationship between the number of outbound trips and the country's resident population.

**Willingness to spend on tourism.** To learn the importance of tourism in the market's shopping cart, these indicators attempted to measure the relative variations in tourism spending and private consumption within a market and to identify trends.

## Economic indicators

**Real GDP.** The aim here was to measure trends in the gross domestic product (the total monetary value of goods and services produced domestically by a country) in real terms, i.e. adjusting for inflation or deflation. GDP is an indicator of its economic health.

**Unemployment rate.** This variable, which reflects the percentage of the workforce which is unemployed at any point in time, has a direct effect on consumption and investment.

## Sociological indicators

**Economic sentiment indicator (ESI).** The European Commission's ESI is the weighted average of five confidence indicators linked to different sectors: industrial, service, consumer, retail, and construction. Thus, it addresses the confidence in terms of both supply and demand.

**Static components.** Here the objective was to assess tourists' attitudes towards the crisis as they are reflected in travel behaviour. To do this, we used the Flash Eurobarometer No. 258 'Attitudes of Europeans towards Tourism' survey, which has three components:

- relationship between the current economic situation and tourists' travel and/or holiday plans;<sup>5</sup>
- changes in decisions about travel, that is, deciding whether to travel or not; and
- changes in *tourists' holiday destination* due to the financial situation.

For each of these indicators, we ranked the countries comparatively, from least vulnerable to most vulnerable, then counted the number of times each country figured among the best 12. For example, the Netherlands was identified as the least vulnerable because it was among the best 12 countries in each of the eight variables analysed.

The following graphic shows the results, with the countries grouped according to their level of vulnerability. The darker the shade, the less vulnerable the country was; thus the darkest shade is reserved for the Netherlands, because it showed the most stable behaviour and had the best scores for the tourism, economic and sociological indicators analysed.

Next best were Spain (domestic travel), Luxembourg, Finland, Austria and Slovenia, which all showed instability in one economic variable; Austria and Slovenia also showed instability in one sociological variable – changes in travel decisions due to the economic crisis.

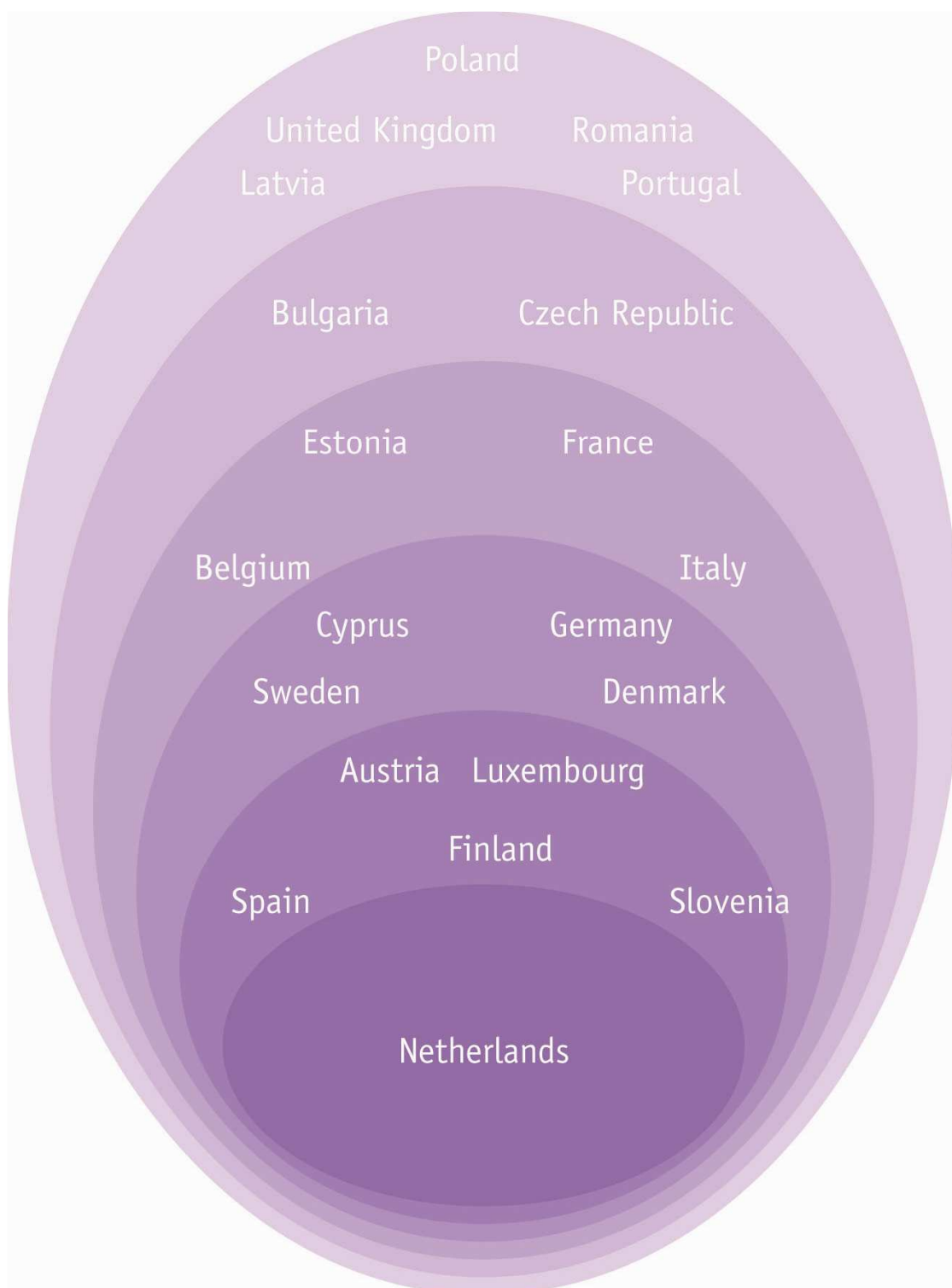
The third group, comprised of Sweden, Cyprus, Germany and Denmark, concludes the list of the 12 least vulnerable countries. Sweden and Denmark ranked slightly better than Cyprus and Germany because of sociological indicators, which showed they had attitude toward tourism despite the crisis. Cyprus and Germany, two countries with quite different economic climates, were shown to lack confidence in their nations' economic recovery.

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<sup>5</sup> Leisure travel lasting four nights or more.

***Vulnerability of European countries to the economic crisis, 2009***

*(The darker the shade, the less vulnerable the country.)*



Source: Regional Government Ministry of Tourism, Trade and Sport of the Junta of Andalucía

## 4. Identifying the most promising European outbound tourism markets in the current economic crisis

What makes a country promising as an outbound tourism market is its resistance to changing its tourism practices despite an economic crisis, a global crisis in this case. The characteristics of a good outbound tourist market for Andalusia dictated use of the following indicators:

**Size.** As measured by the number of a market's outbound tourism trips and the amount of money it spends on international tourism expenditures.

**Accessibility.** This has two aspects:

- The extent to which a given market accepts different tourism offers, as measured by the 'travel rate',<sup>6</sup> which indicates a market's propensity to travel.
- Physical accessibility, i.e. quantifying the obstacles or advantages in the area of transportation. In this case, physical accessibility is measured by the number of direct flights to Andalusia, its distance from the outbound market, and good highway connections.

**Positioning/Image.** Attempts to measure the position of the destination, i.e. the extent to which it is popular and valued by a given country's outbound tourism market, thus giving it a competitive edge vis-à-vis other destinations. In this case, position was measured by the number of departures from a given market to Spain.

The countries were ranked following the same method explained in the previous section, and the results have are shown in a similar graphic.

The ranking identifies as the most promising countries Germany and Finland, which obtained the highest scores in the various indicators. They are followed by Spain (domestic tourism), Sweden and the United Kingdom, all of which lost points in this area because they spent less on outbound tourism, and by France whose low travel rate indicated less outbound travel activity.

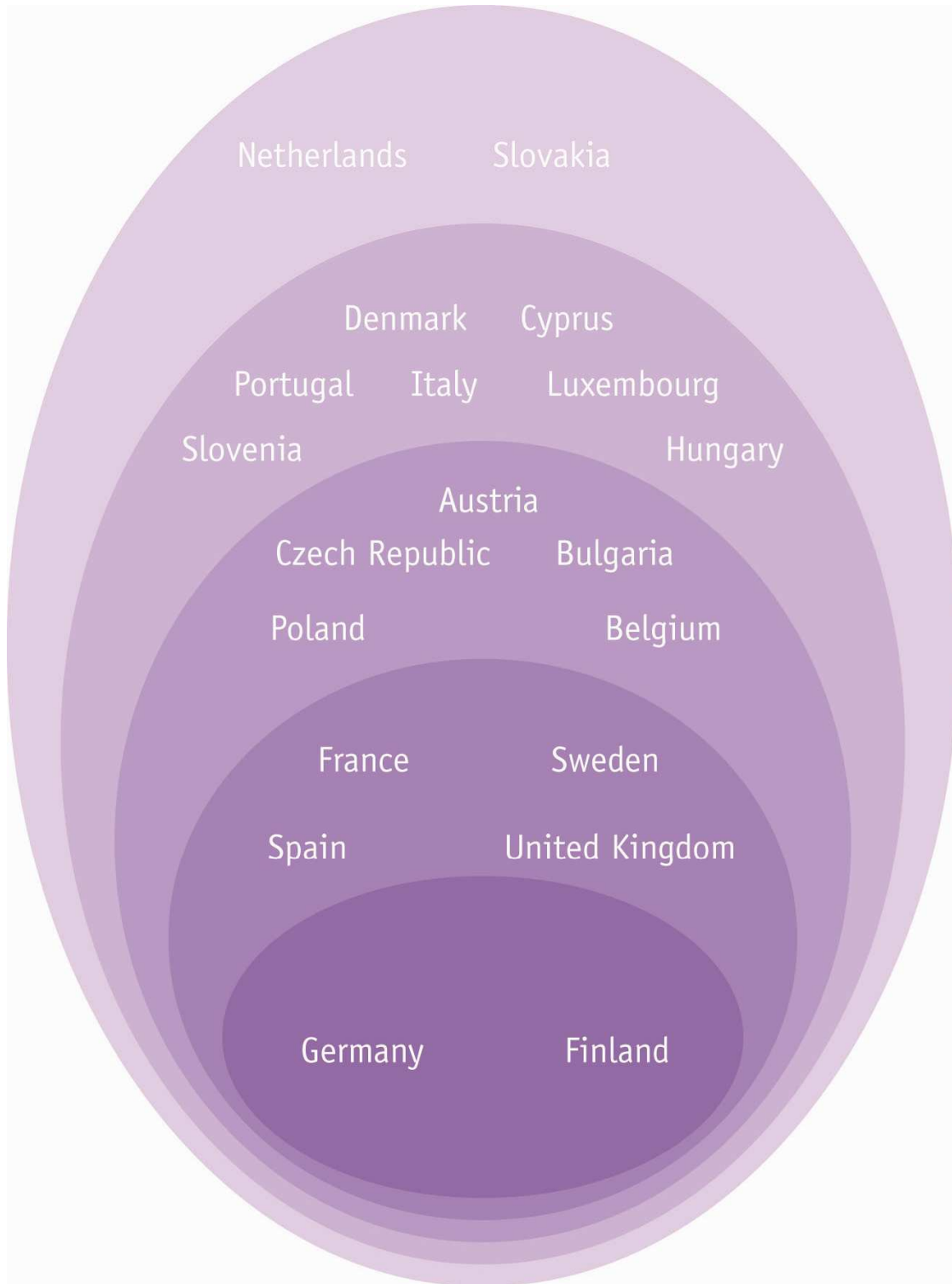
Belgium, Bulgaria, Czech Republic, Austria and Poland make up the third group and close the list of the 12 most promising tourist markets. In this third group, the common feature is that as a destination, we do not hold a significant competitive position; in the case the Czech Republic, Bulgaria and Austria, lack of position is compounded by poor accessibility (lack of transportation connections).

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<sup>6</sup> In this case, only data for 2009 are analysed, not trends.

***Most promising European outbound tourist markets in an economic crisis, 2009***

*(The darker the shade, the more promising the country.)*



Source: Regional Government Ministry of Tourism, Trade and Sport of the Junta of Andalucia

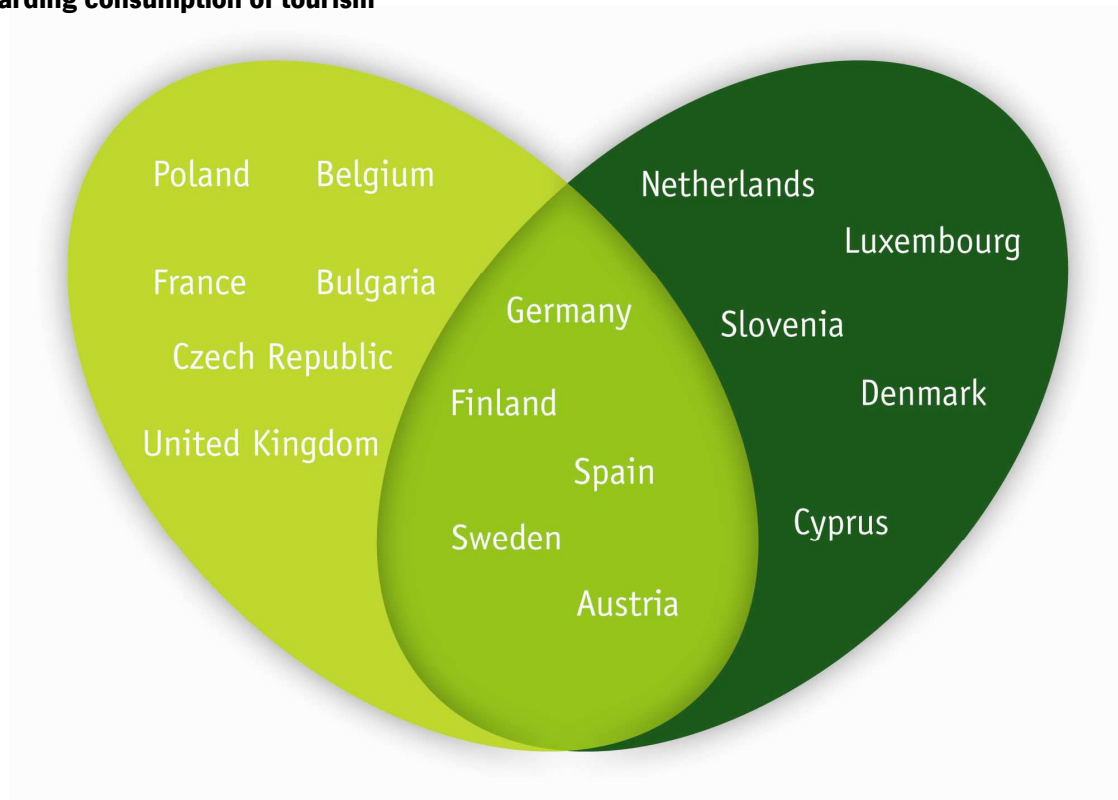


## 5. Target markets for Andalusia in this time of economic crisis

The best European target markets for Andalusia are those among the top-12 countries least vulnerable in the current economic crisis which are also among the top 12 in terms of promise for tourism consumption. The overlay in the graphic below reveals that the list of least economically vulnerable countries in which Andalusia has a competitive position includes Germany, Finland, Spain (domestic trips), Sweden and Austria.

**Most interesting European countries  
regarding consumption of tourism**

**Least vulnerable European countries**



Source: Regional Government Ministry of Tourism, Trade and Sport of the Junta of Andalucía

To this select group, we could add two other groups of countries which we could call moderately promising outbound tourism markets:

- One group consists of Slovenia, Denmark, Cyprus and Luxembourg which ranked high in terms of tourism market stability despite the crisis, but not so high in terms of actual tourism behaviour.
- The other group consists of France and Belgium, which stand out as good outbound tourism markets but which also show somewhat more volatility in tourism behaviour than the select group.

## 6. Weaknesses and strengths of the target markets for Andalusia

A detailed analysis of the factors which taken together quantify the *vulnerability and suitability* of markets for Andalusia as a tourist destination shows the weaknesses and strengths of each country.

The results are shown in the following tables, with a red dot indicating the countries which are among the top 12 for each indicator.

**TOP 5: Five Least Vulnerable European Outbound Tourism Markets in the Current Economic Crisis**

INDICATORS/ COUNTRIES	Germany	Spain	Austria	Finland	Sweden
Propensity to travel / Poblacion	X	X	X	X	
Willingness to spend on tourism / Private Consumption		X	X	X	X
Real GDP	X	X	X		
Unemployment Rate	X			X	
Economic Sentiment Indicator (ESI)			X		X
Relationship financial situation / Holidays	X	X	X	X	X
Changes in travel decisions		X		X	X
Changes of destination	X	X	X	X	X

Source: Regional Government Ministry of Tourism, Trade and Sport of the Junta of Andalusia

Given that there is a big difference between their economies and the way those economies are perceived, it is worth pointing out that tourism behaviour and attitude were relatively stable, with the exceptions of Germany and Austria, where the crisis has had a greater effect on the decision to travel than in the Andalusia's other target markets.

The five countries vary significantly in their economic profiles. Germany is notable for its stable unemployment rate while Austria is noteworthy for its good economic climate, and both countries have stable GDPs.

The other three target markets stand out in only one of the macro variables analysed: Spain for its GDP, Sweden for its economic climate and Finland for its unemployment rate. Thus, we can say that the countries present quite different economic pictures, a fact not reflected in their quite their tourism behaviour which is quite similar.

In the face of the crisis, Spain (a domestic market), Austria and Finland show stable behaviour both in their propensity to travel and their willingness to spend on travel. This reinforce the promise of the Finnish market which ranks highly in other variables and in tourism behaviour. Austria is also a promising market and the strength of the domestic market is worth noting.

Finally, it is in attitudes towards future vacations that we see the most uniform behaviour. All these markets indicate that the economic crisis is not changing their tourism behaviour or their holiday destinations. Furthermore, Spain (the domestic market), Finland and Sweden do not indicate any desire to travel less, either. In the case of Sweden this contradicts its drop in the travel rate.

We find especially interesting the decision not to change travel destinations due to the crisis. This is a strength in the case of Finland and Germany, where we are well positioned, but it could be a weakness in the case of Austria, where our market penetration is still not high.

### TOP 5: Five Most Promising European Outbound Tourism Markets in the Current Economic Crisis

INDICATORS/ COUNTRIES	Germany	Spain	Austria	Finland	Sweden
International Tourist Expenditure	X		X	X	
Outbound Tourism Trips	X	X	X	X	X
Market receptivity	X	X	X	X	X
Physical accessibility	X	X		X	X
Positioning / Image	X	X		X	X

Source: Regional Government Ministry of Tourism, Trade and Sport of the Junta of Andalusia

Germany and Finland are, without a doubt, ideal outbound tourism markets. Both markets are sizeable, and have good access; furthermore, Andalusia is a well-known destination in both. These, then, are good markets where Andalusia is already established, and where strategies should be aimed at building consumer loyalty.

The domestic market (Spain) is still attractive, although less so, since spending on tourism is less than among the other outbound markets selected. Sweden is in the same position.

On the other hand, Austria is an capturable outbound tourism market and Andalusia can still improve its positioning there, but that will demand improved physical access. That is an area in which Austria loses points, reducing its attractiveness as an outbound tourism market.

Finally, although *the Netherlands and the United Kingdom* are not among of the top five, they still deserve special mention, the first for its top ranking in terms of vulnerability and the second for ranking highly as a promising outbound tourism market despite the crisis.

- The *Netherlands* is the outbound tourism market where the economic crisis has least affected tourism behaviour, yet its low ranking in the areas of market size and travel rate exclude it from the group of promising outbound tourism markets.
- *United Kingdom* is a highly promising outbound tourism market, but in the face of the crisis it appears to be very unpredictable and changeable. The crisis has affected its travel rate, its willingness to spend, the number of outbound trips and the destinations chosen, all of which make it a risky outbound market in a time of economic uncertainty.

The countries we identified before as moderately promising, deserve mention, as well, especially Cyprus and Slovenia. Detailed analysis of the variables reveals that these are emerging markets, which suggests their somewhat weaker positions in the area of tourism behaviour merit a closer look.

Those weak positions could reflect their new market status rather than weak tourism behaviour, especially since both countries rank well in travel rate and tourism spending, although not in market size. If that is the case, then these are markets to watch. They show stability in the tourism market despite the economic crisis, a fact which makes them promising enough that they should probably be included among the most promising countries, particularly because they are markets that could be captured if we address our weaknesses the areas of physical access and positioning.

Outbound Tourism Market	Market Type	Characteristics of Tourism Behaviour
Finland and Germany	Mature, captured	They have the best characteristics as outbound tourism markets.
Spain	Domestic market	Good behaviour, somewhat less dynamic in the area of spending.
Austria	Capturable market	We should improve physical access and our positioning.
Sweden	Mature and captured	What makes it somewhat less promising is that it spends relatively less than the other outbound markets selected.
Cyprus and Slovenia	Emerging and capturable markets	Show characteristics of emerging markets. Very positive in their resistance to altering behaviour due to the crisis.
United Kingdom	Classic risky market in a time of crisis	Characteristics show great vulnerability due to the economic climate.

Source: Regional Government Ministry of Tourism, Trade and Sport of the Junta of Andalusia

The importance of studies like this lies not in the fact that it identifies those markets least vulnerable to the economic crisis and those holding the greatest or least promise. It would also be useful to arrive at a measure of the strength of tourism-related responses in terms of time and volume.

Therefore, this work group urges international institutions such as Eurostat (the Statistical Office of the European Commission) to continue to utilise the Flash Eurobarometer n° 258 'Attitudes of Europeans towards Tourism', the survey which is the cornerstone of this study and without which it could not have been done, by providing uniform international information for the 25 European Union countries which are the subject of this study. Continued use and adaptation of the survey, including questions about destinations visited, type of accommodates used, and others, will permit strategies and policies to be honed for markets for tourism destinations.

## Appendix I.

<b>Key Indicators:</b> VULNERABILITY
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<b>Indicator:</b> Propensity to travel
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**Description and objectives:** This aims to identify trends in a country's travel rate, defined as the relationship between the number of outbound trips and the country's resident population.

**Type of indicator:** Quantitative.

**Calculation methodology:** Number of vacation trips abroad of more than one night duration/ Resident Population age 15 and over. The optimal result is obtained from the comparison between the variation in the propensity to travel in the last year available and the average change in the last five years.

**Standards of value:** Criteria for distances, the further away a given outbound tourist market is, the greater the vulnerability.

**Reference year:** 2009; lacking that, 2008.

**Source:** European Statistical Office (Eurostat).

<b>Indicator:</b> Willingness to spend on tourism
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**Description and objectives:** This indicator aims to reveal the importance of tourism in the market's shopping cart. These indicators attempted to measure the relative variations in tourism spending and private consumption within a market and to identify trends.

**Type of indicator:** Quantitative.

**Calculation methodology:** Tourism spending by residents on vacation trips abroad of more than one night duration as compared to private consumption at current prices. Variation in spending on tourism expenditure as compared to the variation in private consumption; yields optimal result when the former exceeds the latter.

**Standards of value:** Criteria for distances, the further away a given outbound tourist market is, the greater the vulnerability.

**Reference year:** 2009; lacking that, 2008.

**Source:** European Statistical Office (Eurostat).

<b>Indicator:</b> Real GDP
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**Description and objectives:** Real GDP aims to measure trends in the gross domestic product (the total monetary value of goods and services produced domestically by a country) in real terms, i.e. adjusting for inflation or deflation. GDP is an indicator of a country's economic health.

**Type of indicator:** Quantitative.

**Calculation methodology:** Percentage of GDP growth. The optimal result is obtained from the comparison between the GDP growth in the last year available and the average change in the last nine years.

**Standards of value:** Criteria for distances, the further away a given outbound tourist market is, the greater the vulnerability.

**Reference year:** 2009.

**Source:** European Statistical Office (Eurostat).

<b>Indicator:</b> Unemployment rate
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**Description and objectives:** This variable, which reflects the percentage of the workforce which is unemployed at any point in time, has a direct effect on consumption and investment.

**Type of indicator:** Quantitative.

**Calculation methodology:** Unemployment rate (%). The optimal result is obtained by comparing the change in the unemployment rate in the last year available with the average change in the last nine years.

**Standards of value:** Criteria for distances, the further away a given outbound tourist market is, the greater the vulnerability.

**Reference year:** 2009.

**Source:** European Statistical Office (Eurostat).

<b>Indicator:</b> Economic sentiment indicator (ESI)
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**Description and objectives:** The European Commission's ESI is the weighted average of five confidence indicators linked to different sectors: industrial, service, consumer, retail, and construction. Thus, it addresses the confidence in terms of both supply and demand.

**Type of indicator:** Qualitative.

**Calculation methodology:** Numerical Indexes. The difference or distance from critical data (March 09 – crisis) defines the degree of optimism or confidence a country exhibits.

**Standards of value:** Criteria for distances, the further away a given outbound tourist market is, the greater the vulnerability.

**Reference year:** 2009 and 2010.

**Source:** European Commission. Economic and Financial Affairs.

<b>Indicator:</b> Static Components
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**Description and objectives:** These aim to assess tourists' attitudes towards the crisis as they are reflected in travel behaviour. To do this, we used the Flash Eurobarometer No. 258 'Attitudes of Europeans towards Tourism' survey, which has three components:

- relationship between the current economic situation and travel and/or holiday plans<sup>7</sup> of tourists;
- changes in decisions about travel, that is, deciding whether to travel or not; and
- changes in tourists' holiday destination due to the financial situation.

**Type of indicator:** Qualitative.

**Calculation methodology:** Percent (%). The optimum for the Andalusian tourist destination comes from the hand of tourists, despite the current economic climate, there has been changes in their travel habits and / or decided to travel and / or has not changed their preference to travel abroad.

**Standards of value:** Uniform scale of measurement (0-1), with 0 being the worst situation and 1 the optimum condition.

**Reference year:** 2009.

**Source:** European Commission Public Opinion Service, the Flash Eurobarometer n° 258 'Attitudes of Europeans towards Tourism' survey.

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<sup>7</sup> Pleasure trips lasting four nights or more.

<b>Indicator Key:</b> SUITABILITY
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<b>Indicator:</b> Size
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**Description and objectives:** It is measured by the number of outbound international tourism trips and the international tourism spending of the market that is being studied.

**Type of indicator:** Quantitative.

**Calculation methodology:** Number of vacation trips abroad of more than one night duration / tourism expenditures of a country's residents on vacation trips abroad of more than one night duration. Ranking.

**Standards of value:** At the top of the list are those outbound tourism markets which have a higher travel rate and a greater number of tourist trips to Andalusia.

**Reference year:** 2009; lacking that, 2008.

**Source:** European Statistical Office (Eurostat).

<b>Indicator:</b> Accessibility
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**Description and objectives:** This indicator has two aspects:

- the extent to which a given market accepts different tourism offers, as measured by the 'travel rate', which indicates a market's propensity to travel.
- physical accessibility, i.e. quantifying the obstacles or advantages in the area of transportation. In this case, physical accessibility is measured by the number of direct flights to Andalusia, its distance from the outbound market.

**Type of indicator:** Quantitative.

**Calculation methodology:** Number of vacation trips abroad of more than one night duration and number of direct flights to Andalusia. Ranking.

**Standards of value:** At the top of the list are those outbound tourism markets which have a higher travel rate and a greater number of flights to Andalusia.

**Reference year:** 2009; lacking that, 2008.

**Sources:** European Statistical Office (Eurostat) and Spanish Airports and Air Navigation (AENA).



<b>Indicator:</b> Positioning / image
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**Description and objectives:** Attempts to measure the position of the destination, i.e. the extent to which it is popular and valued by a given country's outbound tourism market, thus giving it a competitive edge vis-à-vis other destinations. In this case, position was measured by the number of tourist trips from a given market to Spain.

**Type of indicator:** Quantitative.

**Calculation methodology:** Number of tourist trips to Spain of more than four night's duration. Ranking.

**Standards of value:** Spain's position is among the destinations preferred by the outbound tourism market being analysed.

**Reference year:** 2009.

**Source:** European Commission Public Opinion Service, the Flash Eurobarometer n° 258 'Attitudes of Europeans towards Tourism' survey.