



# European Online Travel Report 2009



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## Methodology

The European Online Travel Report 2008 has been produced by EyeforTravel Research using a combination of secondary and primary research.

### Market size definition

In this report the European travel market and specific sector sizes are defined as 'travel sales' to people residing in Europe. Correspondingly, for individual markets and regions, the 'travel market' is the value of 'travel sales' to people residing in these countries or regions and therefore represents the travel expenditure of a particular market. The figures included in this report represent consumer expenditure on domestic travel (travelling within the country of residence) combined with outbound travel (travel to any international destination), thus valuing the total travel spend of particular nations. All figures therefore exclude inbound travel values (foreign expenditure in a particular country).

### Online market figures - calculation/methodology

The online market figures are the sum of estimated online sales in the European market, from as many of the largest online marketers as possible. These major marketers are assumed to represent about 90% of the total European online travel market. The remaining 10% is then added, to reach a grand total. The online sales in the European market from the small marketers are assumed to be split in the same way as the identified big marketers. The sources for the big marketers' online sales are numerous, but are generally published sources such as annual accounts, press releases and website traffic statistics. The estimates have been developed, updated and adjusted one by one over a period of more than 5 years. However, it must be taken into consideration that, even when examining published data, there is an element of interpretation in reaching an actual estimate of online sales. More sources are continuously included, and figures from previous years may therefore have been adjusted slightly. Please note, where IPK International figures are quoted, these are based on international trips, and include business trips, as reported by survey respondents, whereas our figures are based solely on leisure travel expenditure, and include both national and international travel expenditure.

### Categories of countries in this report:

*Main markets:* UK, Germany, France, Italy and Spain

*Southern Europe:* Italy, Spain, Portugal and Greece

*Nordic region:* Sweden, Denmark, Norway, Finland and Iceland

*Middle Europe:* Netherlands, Belgium, Luxembourg, Switzerland, Austria and the Republic of Ireland

*The Twelve New:* The countries, which joined the EU on 1 May 2004: Poland, Baltic States (Lithuania, Latvia, Estonia), Czech Republic, Slovakia, Hungary, Slovenia, Malta, Cyprus; and on 1 January 2007: Romania and Bulgaria