The IPK International is a leading global operating consulting group specialized in tourism qualitative and quantitative market research and tourism marketing worldwide and especially in outbound tourism demand and market trends. A review of their website can be found in Vol. 51 (3) of this journal.

The first continuous annual survey conducted by the IPK in almost all European countries was The European Travel Monitor (ETM) launched in 1988. A decade ago, the survey area was expanded to include non-European countries such as USA, Canada, Brazil, China, Israel and others and renamed into the World Travel Monitor (WTM). Currently, about 50 countries are included in survey of which 36 are in Europe, and the WTM enjoys a reputation as one of the most comprehensive worldwide continuous survey of the international travel patterns.

It is standard practice that the latest World Travel Monitor together with the ETM findings, are presented at the ITB Berlin in March and a selection of main results also pre-sented at their website at about same time.

An outline of the main results presented in this document is now given from the ETM. It gives the number and types of trips undertaken by Europeans who, according to the ETM, made 356 million outbound trips and 3.4 billion over-nights in 2004, or 5 percent increase over the previous year, of which 69 percent were for holiday reason.

According to the ETM results for first eight months of 2005, tourism is recovering, with further 4 percent growth generated mostly by the increase in short city breaks, long-haul trips and strong intra-European flow. There is a clear trend towards shorter but more frequent trips, which are favoured by the introduction of low-cost airlines. The report suggests that countries which do not have any low-cost carriers risk looking less attractive to both travellers and investors.

There has also been a change in the demand pattern where, interesting, Finland and France have the strongest increase in the number of outbound travel. The leading growth destinations for Europeans were Poland, Slovakia, Turkey and, surprisingly, United Kingdom, where terrorist bombing was expected to have adverse impact on inbound tourism.

The IPK has forecasted a good tourism results to be also achieved in 2006, as the European economy is showing clear signs of recovery. The European inbound and outbound tourism is expected to grow at about 2 or 3 percent in 2006, although the growth in international tourism receipts and expenditure on travel will be slightly lower due the forecasted continuous trend of shortening tourism trips.

The significant impact on the growth will have two important sport events to be held in 2006: the World Football Cup in Germany and Winter Olympic games in Italy, especially for the host countries. Leisure travel continues to be a major driver of tourism growth, thanks to a large part to low cost airlines and expected increase in city breaks. Countries without low-cost/no-frills airline services risk to lower their market appeal and to loose their market position, however, the benefits of introducing the low-cost air-carriers might be out-weighted by stimulating outbound travel of resident population.

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