

Tourism

11





Introduction

Tourism is an important and fast-evolving economic activity with social, cultural and environmental implications. It occupies large numbers of small and medium-sized businesses and its contribution to growth and employment varies widely from one region of the EU to another. In rural regions in particular, usually remote from the economic centres of their countries, tourism is often one of the main sources of income for the population and a prominent factor in securing an adequate level of employment.

The crucial role that tourism plays in generating growth and jobs, its growing importance and its impact on other policy areas ranging from regional policy, diversification of rural economies, maritime policy, employment, sustainability and competitiveness to social policy and inclusion ('tourism for all') are widely acknowledged all over the European Union. Therefore, tourism is reflected in EU policy as well as in national policies.

Tourism is a typical cross-cutting industry. Services to tourists involve a variety of branches of the economy: hotels and other accommodation, gastronomy (restaurants, cafés, etc.), various transport operators and also a wide range of cultural and recreational facilities (theatres, museums, leisure parks, swimming pools, etc.). In many regions geared to tourism the retail and services sectors also benefit considerably from the demand generated by tourists in addition to that from the resident population.

Eurostat has been collecting data on trends in, and the structure of, tourism since 1995, based on Council Directive 95/57/EC on the collection of statistical information in the field of tourism. This includes data both on accommodation capacity and occupancy and on tourist behaviour. The tourist behaviour data are, however, only available at national level. By contrast, the data on accommodation capacity and occupancy are also available by region.

The regional data on occupancy of tourist accommodation from different perspectives are summed up in this chapter. Since the number of overnight stays, which reflects both the length of stay and the number of visitors, is the central indicator for accommodation services, this chapter will concentrate exclusively on this variable.

Top 20 tourist regions in the EU-27

Figure 11.1 shows the 20 regions in the European Union with the highest number of overnight stays, broken down by hotels and campsites. These regions account for 36 % of the total number of overnight stays in all 271 regions of the EU-27 for which data are available.

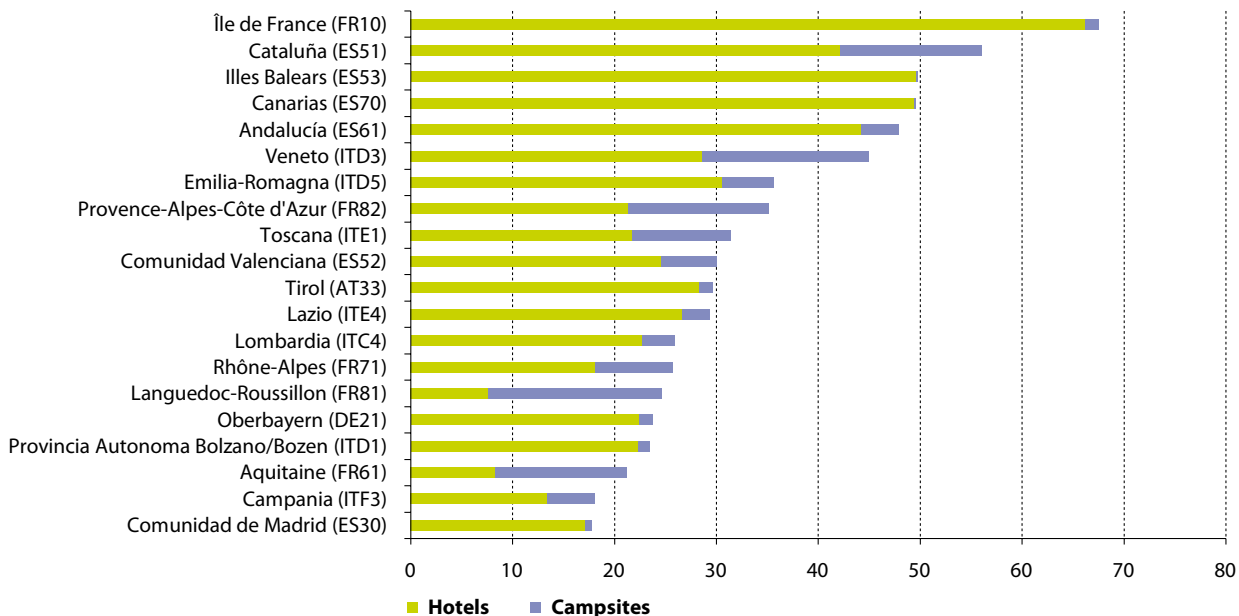
The dominance of European tourism by Spain, Italy and France is clearly visible. Tirol in Austria (11th place) and Oberbayern in Germany (16th place), which includes the Bavarian metropolitan area of München, are the only regions in the top 20 that are not in one of those three leading tourism countries.

With 67.5 million overnight stays, the Île de France region, which includes the French capital Paris, is well in the lead, followed by four Spanish regions: Cataluña (56.0 million), Illes Balears (49.8 million), Canarias (49.6 million) and Andalucía (47.9 million).

In 18 of the 20 regions more nights are spent in hotels and similar establishments (from 100 % to 61 %) than on campsites. In two French regions, Languedoc-Roussillon and Aquitaine, however, this is not the case. They attract more tourists to campsites than to other types of accommodation. Only 31 % of overnight stays are spent in hotels as opposed to campsites in Languedoc-Roussillon and 39 % in Aquitaine, whereas in all 271 regions in the EU-27 the share of overnight stays spent in hotels is 81 %.

Figure 11.2 shows the top 20 EU regions recording the highest number of total overnight stays in hotels and on campsites by foreign tourists. These top 20 regions account for 49 % of all overnight stays by non-residents across the EU-27. Within the top 20, the first six regions (Illes Balears, Canarias, Île de France, Cataluña, Veneto and Tirol) together recorded as many nights as the next 14. Hotels clearly play a dominant role compared with accommodation on campsites for non-resident tourists. The share of overnight stays by foreign tourists taken by hotels ranges from 100 % to 58 %. Nevertheless, in two of the top 20 regions, campsites take almost the same share as hotels: the French region of Provence-Alpes-Côte d'Azur, where the share of campsites is 42 %, and the Italian region of Veneto with 40 %. In absolute figures,

Figure 11.1: Top 20 EU-27 tourist regions, number of nights spent by residents and non-residents in hotels and campsites, by NUTS 2 regions, 2008 (million nights)



Source: Eurostat ([tour_occ_n](#)).

Veneto, with 11.4 million overnight stays by non-residents on campsites, is far in the lead, followed by Cataluña (7.5 million) and Provence-Alpes-Côte d'Azur (5.9 million). In Cataluña, since hotel occupancy is quite high (28.0 million nights), despite campsites' good absolute figures, their share is only 21 % and is lower by half than in the other two regions mentioned.

Regions with over 8 million overnight stays

Map 11.1 gives an overview of numbers of overnight stays by both residents and non-residents in the regions of Europe. Here too, it is clear that tourism in Europe is concentrated around the Mediterranean. The Alpine regions also occupy a strong position. In addition to the five abovementioned countries represented in the top 20 EU regions (Italy, Spain, France, Austria and Germany), 10 more countries have NUTS 2 regions reporting more than 8 million overnight stays: Turkey, the United Kingdom, Croatia, Portugal, Greece, the Netherlands, Cyprus, the Czech Republic, Sweden and Switzerland.

Regions popular with tourists from the same country

Table 11.1 shows the regions where residents from the same country spent the highest number of overnight stays in hotels or on campsites, both in absolute and relative figures (i.e. as a percentage of overnight stays by residents in their own country).

It is interesting to look at the preferences of tourists from the same country in terms of type of region, although, apart from the main factor which is its natural attractiveness for tourism, the popularity of a region is partly influenced by its size and the size of the country as a whole. Therefore, for nine countries ⁽¹⁾ with only one NUTS 2 region, this kind of information is not relevant, while for those ⁽²⁾ with only two NUTS 2 regions the figure is likely to be higher because tourists have only a limited choice of regions in those countries.

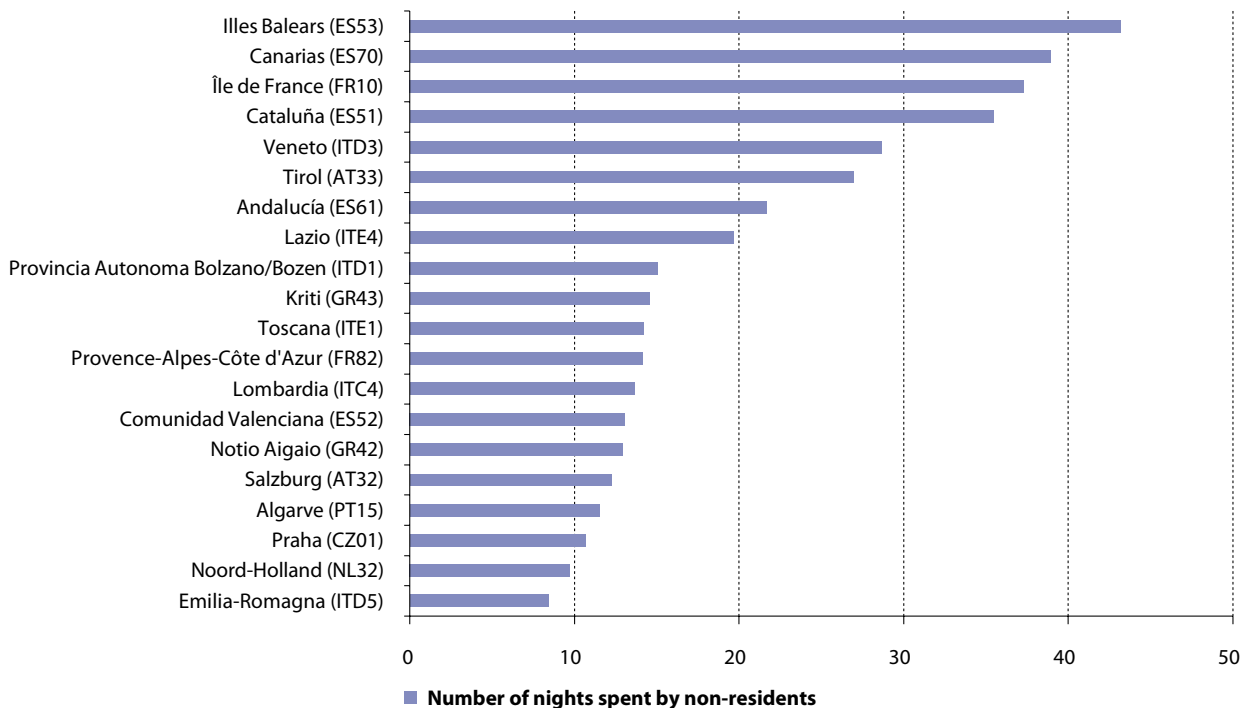
Resident tourists most often visit regions close to the seaside; this was the case for 16 out of the 25 countries. But there are also countries like France, Germany or Poland, where residents spent the highest number of nights in the capital

⁽¹⁾ Estonia, Cyprus, Latvia, Lithuania, Luxembourg, Malta, the former Yugoslav Republic of Macedonia, Iceland and Liechtenstein.

⁽²⁾ Ireland, Slovenia and Croatia.



Figure 11.2: Top 20 EU-27 tourist regions, number of nights spent by non-residents in hotels and campsites, by NUTS 2 regions, 2008 (million nights)



Source: Eurostat ([tour_occ_n](#)).

region, or countries where mountain regions are the most popular, such as Steiermark in Austria, Ostschweiz in Switzerland, Stredné Slovensko in Slovakia and Severovýchod in the Czech Republic. Nevertheless, cities (especially capital cities) are more frequent destinations for trips abroad. Examples include regions such as Praha in the Czech Republic or Wien in Austria where the share of overnight stays by non-residents is much higher than by residents. Further information about non-residents is given in the section on inbound tourism at the end of this chapter.

(³) Greece (3 regions), Spain (2), France (1), Italy (3), Cyprus (1), Malta (1), the Netherlands (1), Austria (4), Portugal (2), Finland (1), the United Kingdom (4), Croatia (1) and Turkey (1).

Tourism intensity (carrying capacity)

Another revealing indicator is tourism intensity (also called carrying capacity). This measures total arrivals or overnight stays in relation to the total permanent resident population and provides an estimate of tourism potential. This serves as an indicator of the relative importance of tourism for a region. It is generally a better guide to the economic significance of tourism for a region than the absolute number of overnight stays.

Furthermore, in the context of the sustainability of tourism, it can also be seen as an indicator of the possible tourism pressure.

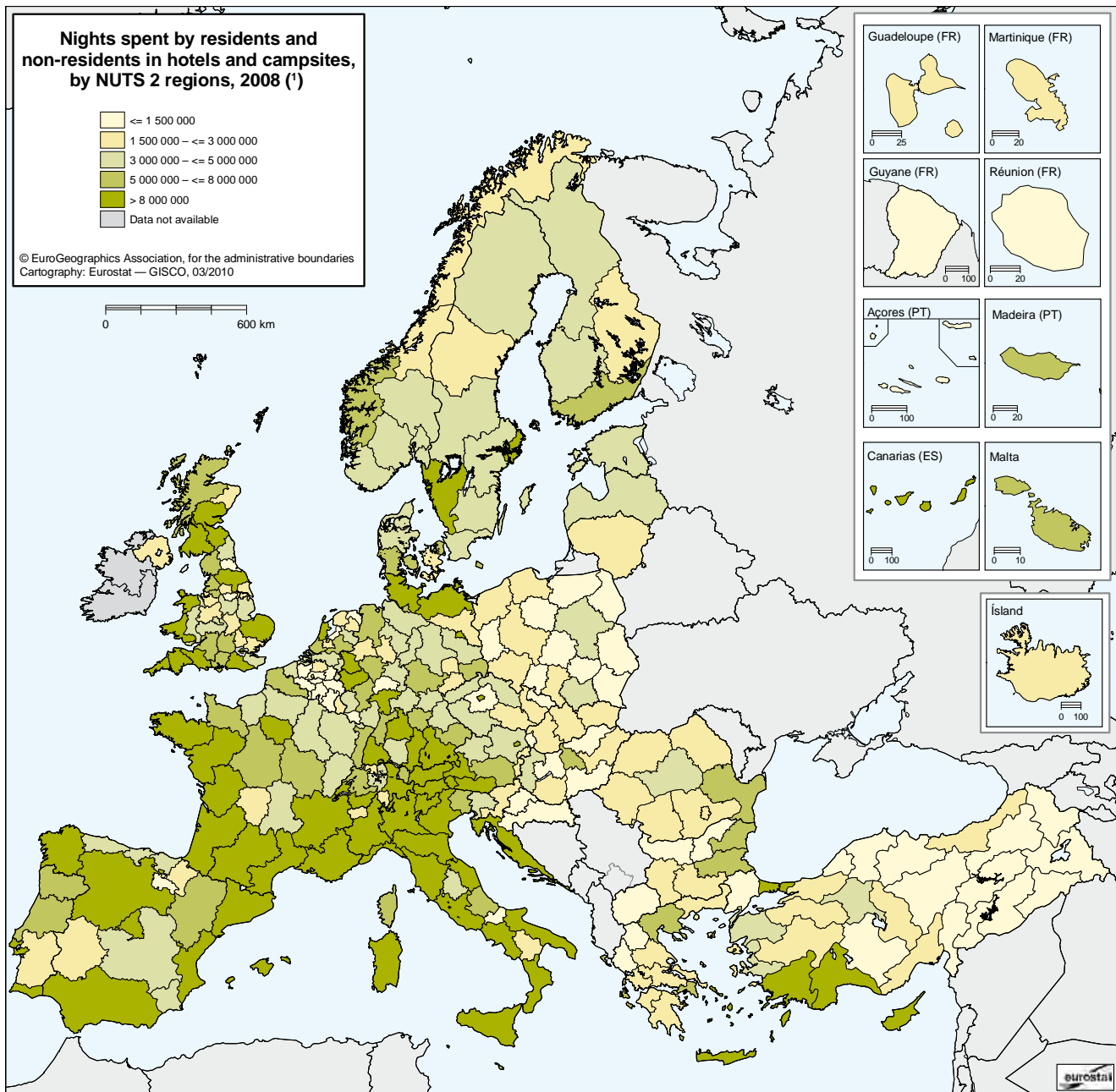
The huge importance of tourism to many of Europe's coastal regions and, even more so, to its islands and also to most of the Alpine regions of Austria and Italy is evident from Map 11.2.

Of the 25 regions in 13 countries (³) with tourism intensity of more than 10 000 overnight stays in hotels or on campsites per 1 000 inhabitants, 12 are island regions, seven are Alpine and the other six are coastal. The Spanish region of Illes Balears shows the highest tourism intensity, with 47 641 overnight stays per 1 000 inhabitants, followed by the Greek region of Notio Aigaio (47 542), the Italian Provincia Autonoma Bolzano/Bozen (47 497) and the Austrian region of Tirol (42 123).

By contrast, at the other end of the ranking there are 25 regions with fewer than 500 overnight stays per 1 000 inhabitants. Most of them are located in Turkey (13) or Poland (8).



Map 11.1: Nights spent by residents and non-residents in hotels and campsites, by NUTS 2 regions, 2008 (1)



(1) Sweden and United Kingdom, 2007; Turkey, 2007 and hotels only; Switzerland, hotels only; London (UKI), no breakdown by NUTS 2 regions.

Source: Eurostat ([tour_occ_n](#)).



Table 11.1: Most popular tourist region per country, number of nights spent by residents in hotels and campsites, by NUTS 2 regions, 2008 ⁽¹⁾

Country	Resident nights in the country	Region with the highest share in each country	Resident nights in the region	Regional share (%)
Belgium	6 534 808	Prov. West-Vlaanderen (BE25)	2 261 779	35
Bulgaria	5 426 372	Yugozapaden (BG41)	1 229 172	23
Czech Republic	11 617 852	Severovýchod (CZ05)	2 737 262	24
Denmark	15 585 115	Syddanmark (DK03)	4 683 226	30
Germany	192 523 599	Oberbayern (DE21)	16 839 753	9
Estonia	1 287 883			
Ireland	10 724 000	Southern and Eastern (IE02)	7 372 000	69
Greece	17 650 614	Kentriki Makedonia (GR12)	3 217 815	18
Spain	129 612 713	Andalucía (ES61)	26 167 570	20
France	194 048 978	Île de France (FR10)	30 231 955	16
Italy	178 731 413	Emilia-Romagna (ITD5)	27 220 385	15
Cyprus	1 170 655			
Latvia	1 091 190			
Lithuania	1 107 488			
Luxembourg	111 727			
Hungary	8 341 332	Nyugat-Dunántúl (HU22)	2 066 590	25
Malta	335 032			
Netherlands	33 366 000	Noord-Holland (NL32)	5 506 500	17
Austria	22 914 846	Steiermark (AT22)	4 449 786	19
Poland	17 830 890	Mazowieckie (PL12)	2 656 968	15
Portugal	18 068 873	Algarve (PT15)	4 517 889	25
Romania	16 828 251	Sud-Est (RO22)	4 749 439	28
Slovenia	2 505 247	Vzhodna Slovenija (SI01)	1 537 835	61
Slovakia	3 819 162	Stredné Slovensko (SK03)	1 404 436	37
Finland	13 126 250	Etelä-Suomi (FI18)	4 835 756	37
Sweden	30 850 403	Västsvrige (SE23)	7 241 398	23
United Kingdom	152 655 060	West Wales and The Valleys (UKL1)	10 870 868	7
Croatia	3 325 245	Jadranska Hrvatska (HR03)	2 537 637	76
Former Yugoslav Republic of Macedonia	418 804			
Turkey	41 775 470	Antalya (TR61)	7 076 415	17
Iceland	684 666			
Liechtenstein	3 619			
Norway	19 630 590	Sør-Østlandet (NO03)	3 967 392	20
Switzerland	15 855 427	Ostschweiz (CH05)	4 402 638	28

⁽¹⁾ Västsvrige (SE23), 2007; Malta, Antalya (TR61) and Ostschweiz (CH05), 2007 and hotels only.

Source: Eurostat ([tour_occ_n](#)).

Tourism density

This variable is modelled on population statistics and tries to show the ratio of the overnight stays by tourists to the size of the territory, in the same way as population density does. This indicator aims at improving comparability between regions which differ in size across Europe. Generally, capital city regions are among the most 'densely visited', as Map 11.3 shows.

Brussels is in the lead in terms of tourism density (31 113 nights per km²), followed by five other capital city regions which have a density above 16 000 nights per km²: Inner London (27 331), Malta (24 559), Wien (23 374), Praha (23 293) and Berlin (16 455).

Average length of stay

The number of overnight stays in a region is the product of the number of visitors and their average length of stay. The importance of each of the two factors depends on the nature of the region. For example, urban regions frequently have very large numbers of visitors, but they tend to stay for only a few days. A large proportion of visitors to these regions are often there for professional reasons. But even tourists staying for private reasons tend to opt for short stays. By contrast, stays are generally substantially longer in the typical holiday regions visited chiefly for recreational purposes. To that extent, average lengths of stay can also indicate the tourist nature of a region.

Map 11.4 shows the NUTS 2 regions in Europe by average length of stay of visitors. Once again, it can be seen that the typical holiday areas in the European Union with the longest average visitor stays are very often coastal regions. They either have long coastlines or are islands and therefore encircled by the sea. None of the 21 NUTS 2 regions where the average length of stay of visitors is five nights or more is completely landlocked: they are either island regions or have long coastlines.

Trends in tourism

Tourism in the European Union increased overall from 2000 to 2008, as shown in Figure 11.3. After 2000 and 2001, each with 1.75 billion overnight stays in hotels or on campsites, tourism declined

in 2002 and 2003, due partly to the economic slowdown but also certainly to the 9/11 attacks. The number of overnight stays decreased to 1.73 billion in 2003 but then increased markedly from 2004 to 2007. In 2008 the number of overnight stays in hotels or on campsites in the EU Member States went down again slightly, to 1.92 billion.

Map 11.5 shows the trend in overnight stays over the period 2004–08. It shows that the main beneficiaries of the upswing in tourism over this period were the regions in the Baltic States, Poland, Bulgaria, Turkey, the United Kingdom and Greece. With a 64 % increase, the Dutch region of Overijssel is far in the lead, followed by the Turkish region of Hatay (up by 23 %) and the English region of Tees Valley and Durham (up by 21 %).

Figure 11.4 shows the performance of each Member State over the period from 2004 to 2008. It displays the same information as Map 11.5 but at country level. Therefore it is not surprising that Baltic States (in particular Lithuania and Latvia) recorded the highest increase with over 12 %. Poland, Greece and Bulgaria gradually became more attractive for tourists, with average annual growth above 5 %. Two Member States nevertheless showed an average annual fall from 2004 to 2008. They are Luxembourg with a decrease of 3 % and Cyprus with 1 %.

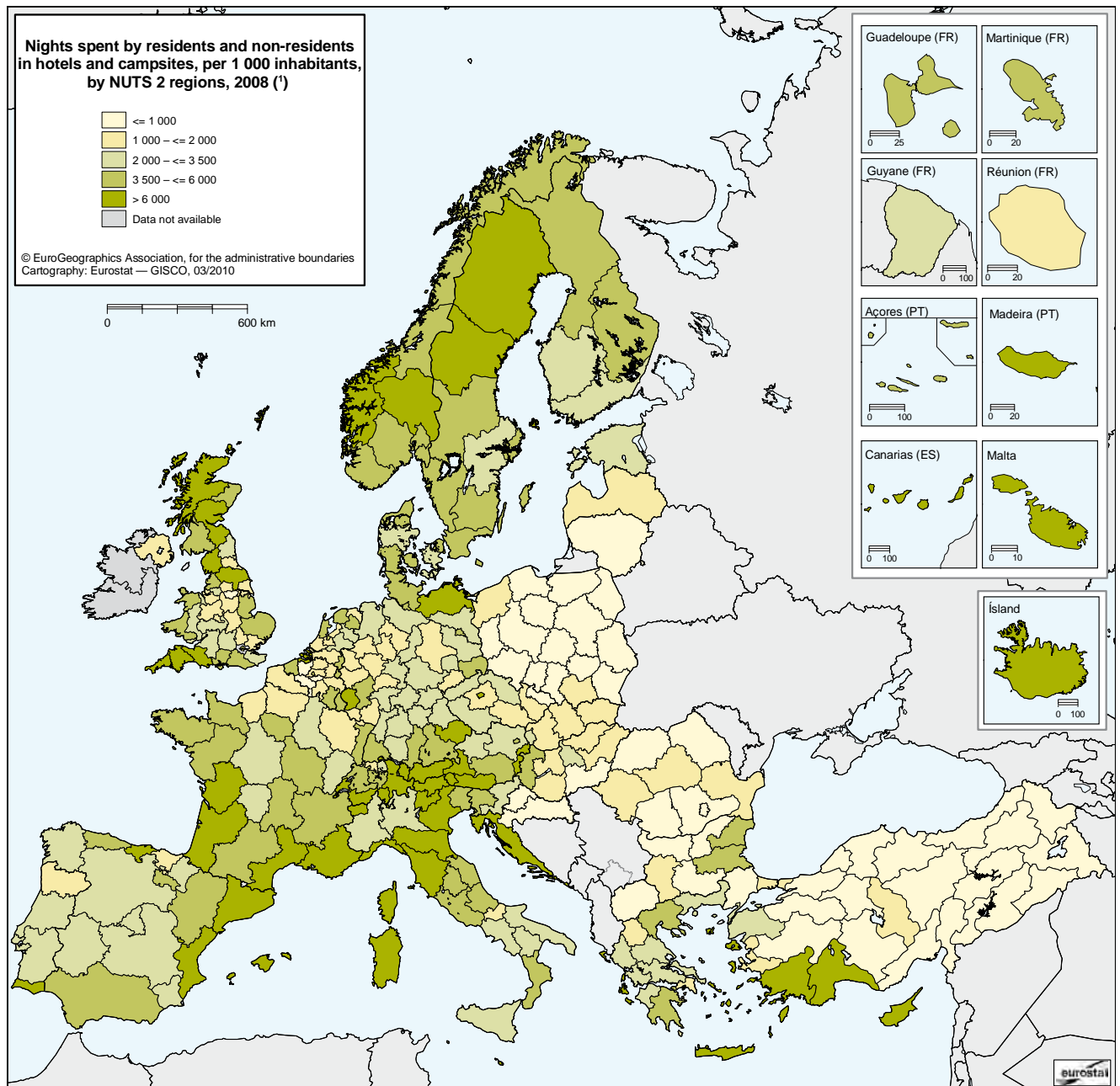
Inbound tourism

Inbound tourism, i.e. visits from abroad, is of particular interest to most analyses of tourism in a given region. The statistically important factor here is the usual place of residence of the visitors, not their nationality. Foreign visitors, particularly from far-away countries, usually spend more per day than visitors from the same country during their stays and thus generate greater demand for the local economy. Their expenditure also contributes to the balance of payments of the country visited. They therefore help to offset foreign trade deficits.

Map 11.6 shows overnight stays by foreign visitors as a percentage of total overnight stays in the various regions. The values differ very widely from region to region: from under 2 % to well over 90 %. Europe's island regions, or at least those in the south, show particularly high figures for foreign visitors as a percentage of total overnight



Map 11.2: Nights spent by residents and non-residents in hotels and campsites, per 1 000 inhabitants, by NUTS 2 regions, 2008 ⁽¹⁾

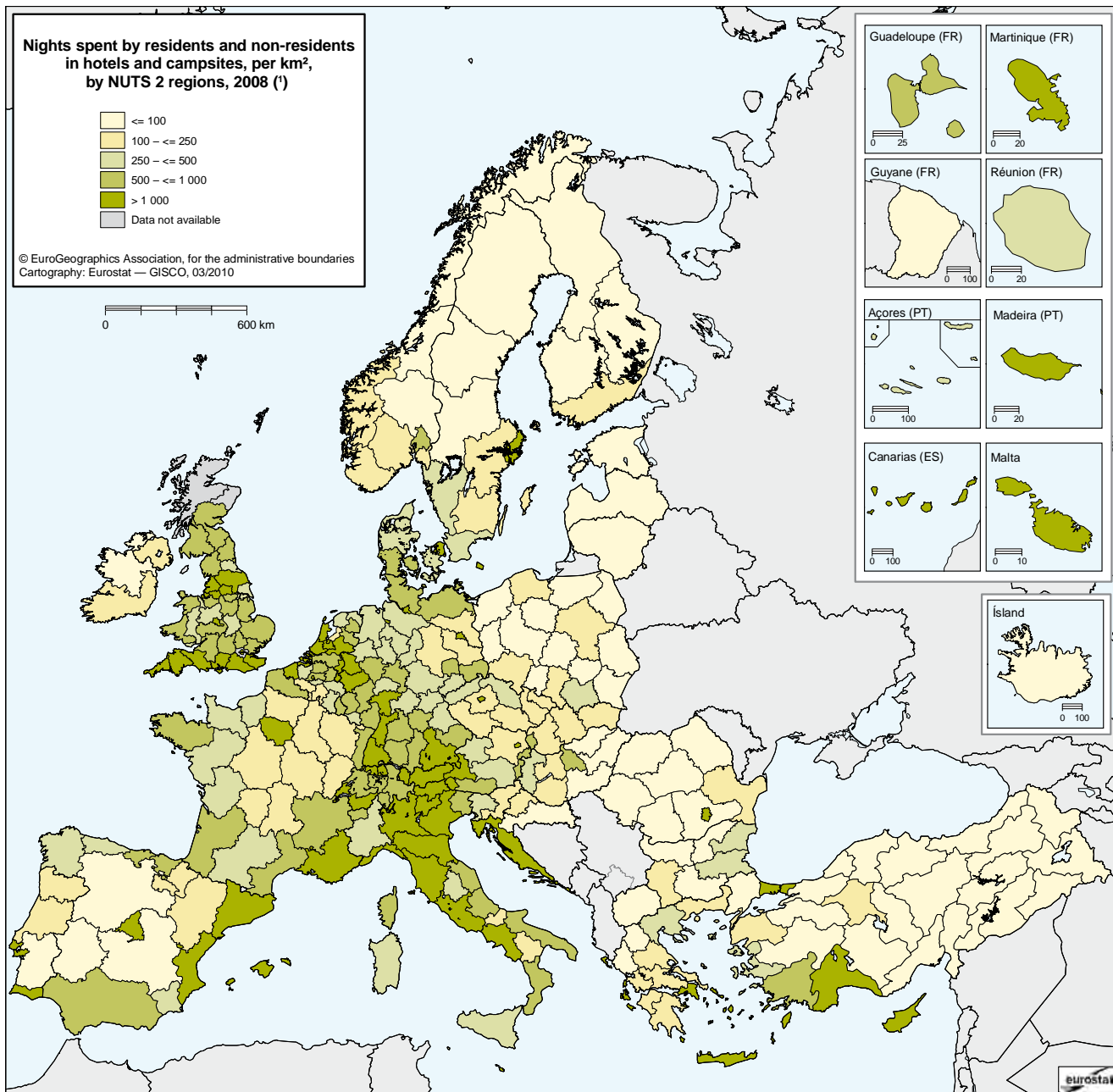


⁽¹⁾ Sweden and United Kingdom, 2007; Turkey, 2007 and hotels only; Switzerland, hotels only; London (UK), no breakdown by NUTS 2 regions; Norway, 2007 population.

Source: Eurostat ([tour_occ_n](#) and [reg_d3area](#)).



Map 11.3: Nights spent by residents and non-residents in hotels and campsites, per km², by NUTS 2 regions, 2008 (1)

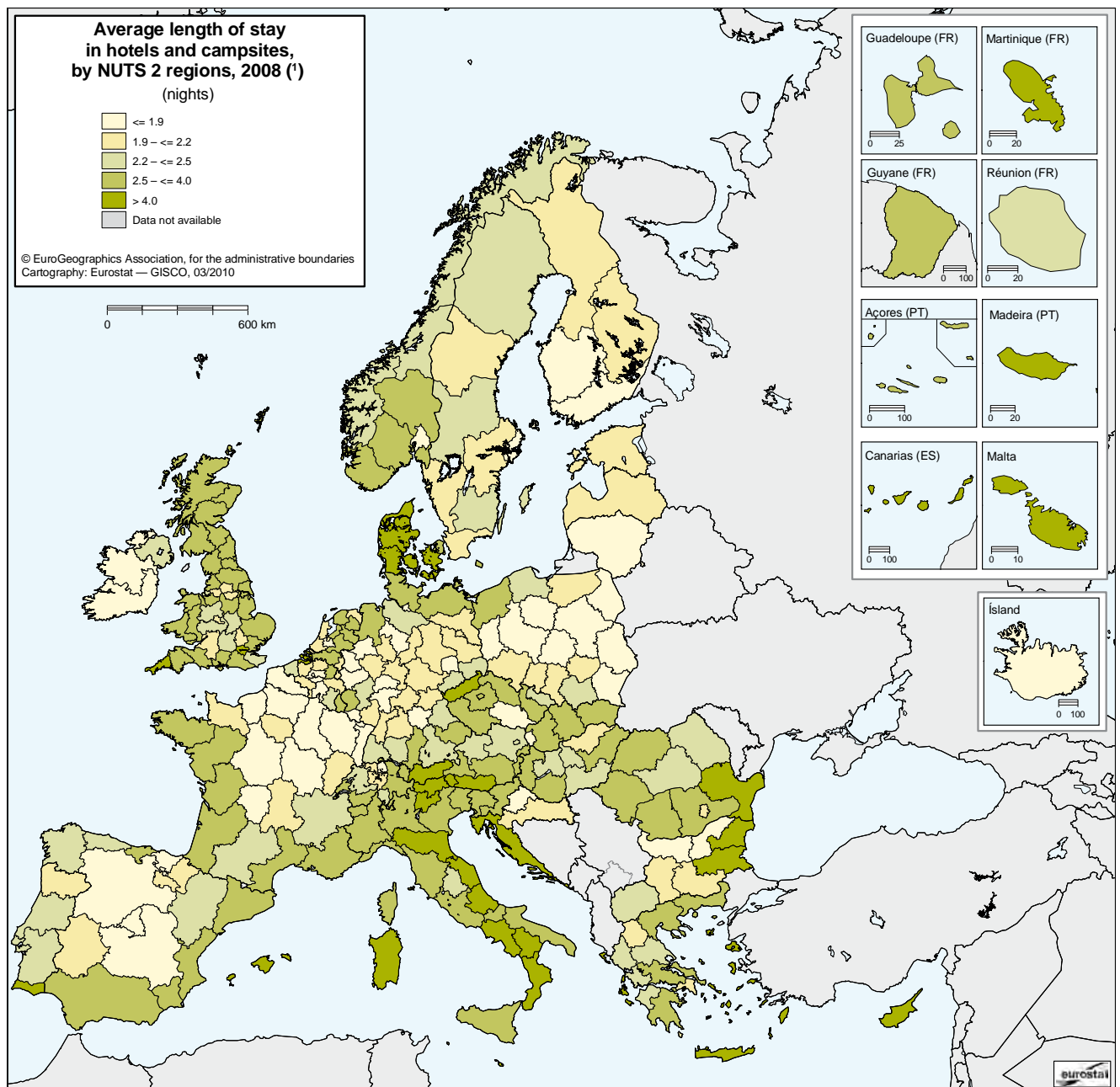


(1) Sweden and United Kingdom, 2007; Turkey, 2007 and hotels only; Switzerland, hotels only; London (UKI), no breakdown by NUTS 2 regions; Bulgaria, Italy, Lithuania, Hungary, Netherlands and Slovenia, 2007 area data; Spain, Cyprus, Luxembourg, Malta, Poland and Croatia, 2006 area data.

Source: Eurostat ([tour_occ_n](#) and [reg_d3area](#)).



Map 11.4: Average length of stay in hotels and campsites, by NUTS 2 regions, 2008 ⁽¹⁾
(nights)

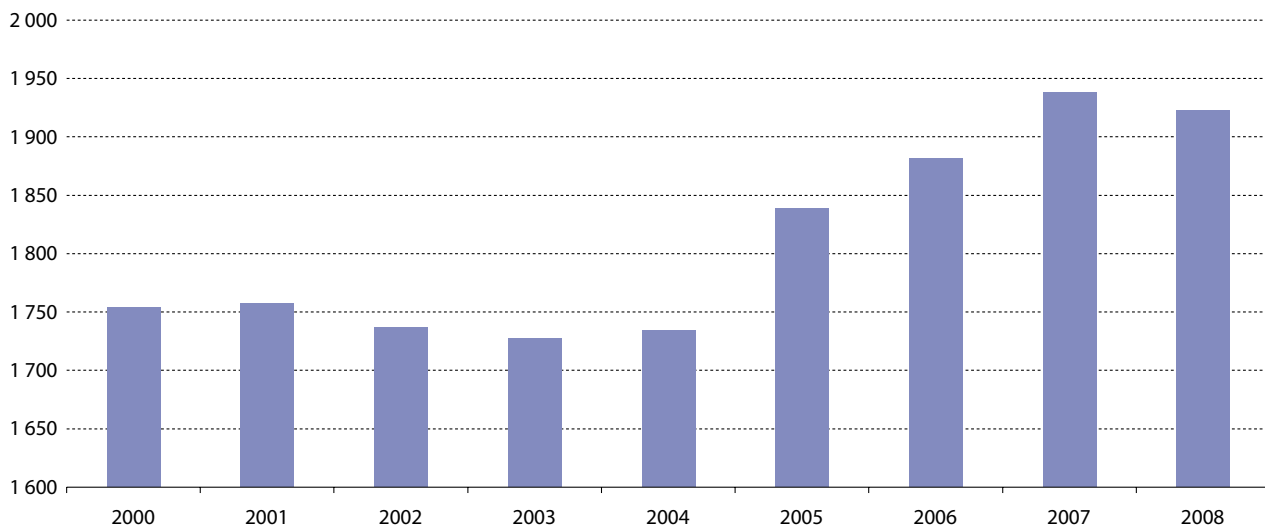


⁽¹⁾ Sweden and United Kingdom, 2007; Switzerland, hotels only; London (UKI), no breakdown by NUTS 2 regions.

Source: Eurostat ([tour_occ_n](#) and [tour_occ_a](#)).



Figure 11.3: Evolution of nights spent in hotels and campsites, 2000–08, in the EU-27 ⁽¹⁾
(million nights)



⁽¹⁾ Estonia, only hotels for 2000 and 2001; Ireland, only hotels for 2001; Cyprus, only hotels for 2000 and 2002; Malta, only hotels; Sweden and United Kingdom, estimated for 2008.

Source: Eurostat ([tour_occ_n](#)).

stays. This is true not only for the island states of Malta and Cyprus but also for the Greek island regions, the Spanish Illes Balears and Canarias and the Portuguese Região Autónoma da Madeira. Foreign visitors also account for more than 90 % of overnight stays in Liechtenstein, Luxembourg, the Czech region of Praha, the Croatian region of Jadranska Hrvatska and the Austrian region of Tirol.

Conclusion

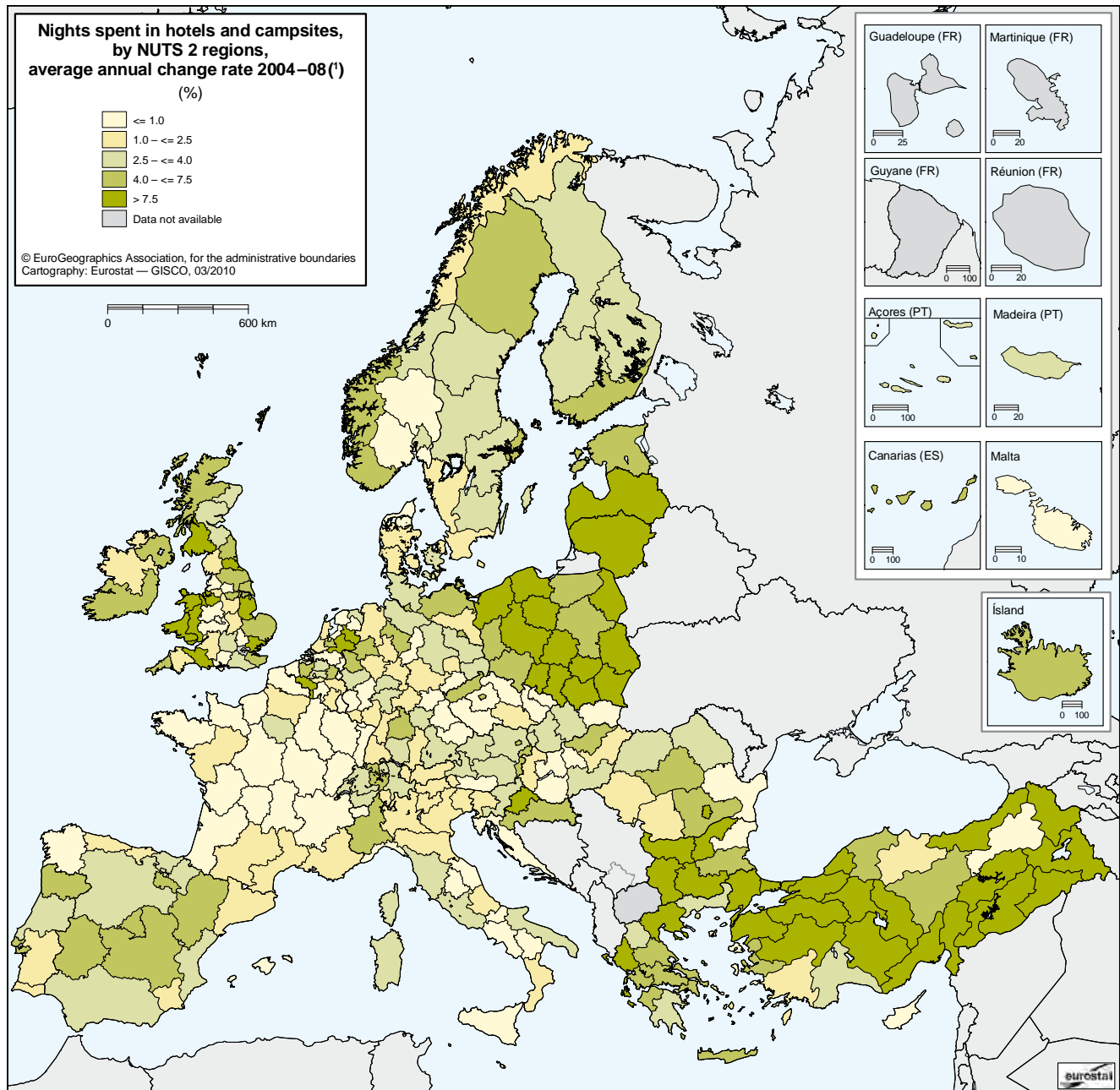
According to the World Tourism Organisation, Europe is the most frequently visited region in the world. Five of the top 10 countries for visitors in the world are European Union Member States. The wealth of its cultures, the variety of its landscapes and the exceptional quality of its tourist infrastructure are some of the probable reasons for this prominent position. Enlargement has hugely enriched

the European Union's tourism potential by enhancing its cultural diversity and providing interesting new destinations to discover.

Analysis of the structure of, and trends in, tourism in Europe's regions confirms the compensatory role which this sector of the economy plays in many countries. It is particularly significant in regions remote from the economic centres of their country. There, tourism services are often a prominent factor in securing employment and are one of the main sources of income for the population. This applies especially to Europe's island states and regions, to many coastal regions, particularly in southern Europe, and to the whole of the Alpine region. The particularly dynamic growth in tourism in most of the 'new' central and eastern European Member States is a significant factor in helping their economies to catch up more rapidly with those of the 'old' Member States.



Map 11.5: Nights spent in hotels and campsites, by NUTS 2 regions, average annual change rate, 2004–08⁽¹⁾
(%)

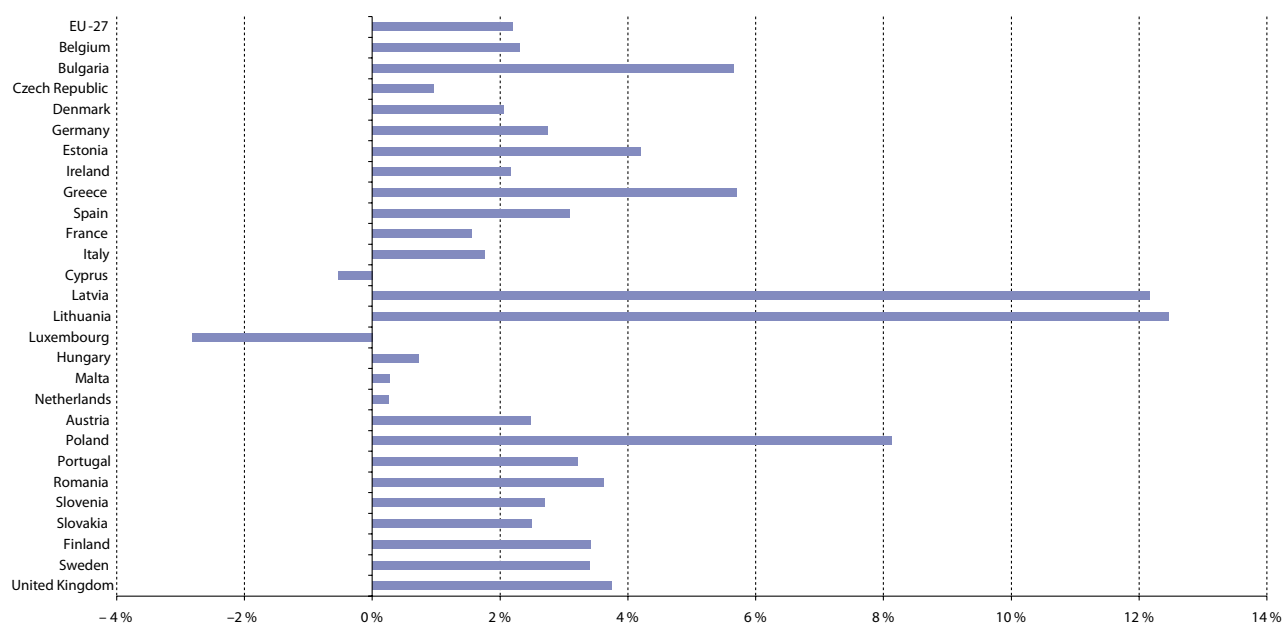


⁽¹⁾ Sweden and United Kingdom, 2007; Turkey, 2007 and hotels only; Switzerland, hotels only; London (UKI), no breakdown by NUTS 2 regions.

Source: Eurostat ([tour_occ_n](#)).



Figure 11.4: Nights spent in hotels and campsites, EU-27, average annual change rate, 2004–08 ⁽¹⁾ (%)

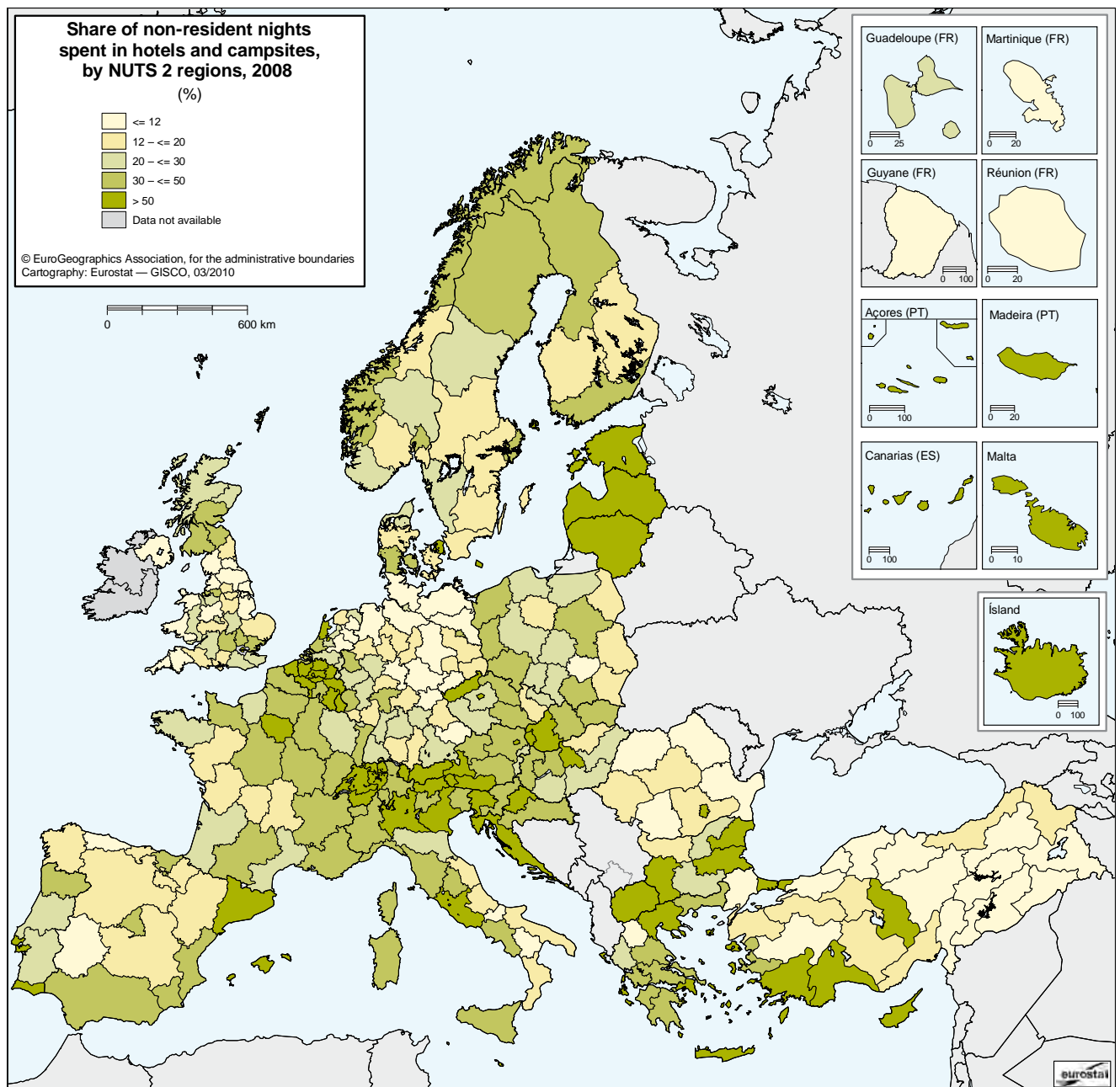


⁽¹⁾ Malta, only hotels; Sweden and United Kingdom, estimated for 2008.

Source: Eurostat ([tour_occ_n](#)).



Map 11.6: Share of non-resident nights spent in hotels and campsites, by NUTS 2 regions, 2008 ⁽¹⁾
(%)



⁽¹⁾ Sweden and United Kingdom, 2007; Turkey, 2007 and hotels only; Switzerland, hotels only; London (UKI), no breakdown by NUTS 2 regions.

Source: Eurostat ([tour_occ_n](#)).



Methodological notes

Harmonised statistical data on tourism have been collected since 1996 in the Member States of the European Union on the basis of Council Directive 95/57/EC of 23 November 1995 on the collection of statistical information in the field of tourism. The programme covers both the supply side, i.e. data on available accommodation capacity (establishments, rooms and bedplaces) and its occupancy (number of visitor arrivals and overnight stays), and the demand side, i.e. the travel behaviour of the population. Results by region below Member State level are available only for the supply side, however.

The tourism statistics presented in this chapter relate only to 'hotels and similar establishments' and 'tourist campsites'. Statistics for 'holiday dwellings' and 'other collective accommodation', on which data are also collected under the tourism statistics directive, are not included in this analysis since their comparability must still be regarded as limited, particularly at regional level.

One important thing to point out is that the statistical definition of 'tourism' is broader than the common, everyday definition. It encompasses not only private trips but also business trips. This is primarily because it views tourism from an economic perspective. Private visitors and business visitors have broadly similar consumption patterns. They both make significant demands on transport, accommodation and restaurant services. To providers of these services, it is of secondary interest whether their customers are private tourists or on business. Tourism promotion departments, on the other hand, are keen to combine the two aspects by emphasising the attractiveness of conference locations as tourist destinations in their own right and give particular prominence to this in their marketing activities.