

Tourism

11





Introduction

This chapter presents the regional pattern of tourism in the European Union in 2009. It mainly tracks tourism occupancy in tourist accommodation establishments. The tourism statistics used in this chapter refer to 'hotels and similar establishments' and 'tourist campsites' (for more details, see data sources and availability).

The number of overnight stays, which reflects both the length of stay and the number of visitors, is the key indicator for accommodation statistics, so this chapter concentrates mostly on this variable. It also presents figures on the capacity of collective tourist accommodation in European regions.

Main statistical findings

Tourism in the EU-27: trends and facts

Tourism in the European Union increased by 7.2% overall from 2000 to 2009, giving an average annual change rate of 0.8%. However, as shown in Figure 11.1, the tourist accommodation sector was affected by the financial crisis: from a peak at 1.94 billion in 2007, the number of overnight stays dropped successively in 2008 and 2009 to 1.88 billion nights, below the level of 2006.

According to the Eurostat *Statistics in focus* on 2010 first results, the tourist accommodation sector started to recover in 2010, with the number of nights spent at hotels and similar establishments increasing by 2.8% compared with 2009⁽¹⁾.

Before going further into regional details, it is worth making a key observation: three Member States accounted for nearly half of all nights spent in hotels and campsites in the European Union in 2009: Italy, France and Spain. As shown in Figure 11.2, adding Germany and the United Kingdom increases this to three quarters.

Top 20 tourist regions in the EU-27

Out of the 20 top tourist regions in the EU-27 in 2009 (in terms of nights spent at hotels and campsites), 17 regions were from Spain, Italy and France.

Figure 11.3 shows the 20 regions in the European Union with the highest number of overnight stays, broken down by hotels and campsites. These regions accounted for 36.5% of all overnight stays in all 271 regions of the EU-27 for which data are available.

⁽¹⁾ For more details, see 'Slow recovery of the tourist accommodation sector in 2010', *Statistics in focus* No 6/2011.

With 63.6 million overnight stays, the Île-de-France region, which includes the French capital Paris, was well in the lead, followed by three Spanish regions: Cataluña (54.1 million), Illes Balears (45.9 million) and Canarias (45.3 million). The region of Veneto in Italy took fifth place (44.8 million). Almost one in seven tourism nights spent in hotels or campsites across the EU was spent in one of these top five regions.

Inner London (seventh place), Tirol in Austria (11th place) and Oberbayern in Germany (18th place), which includes the Bavarian metropolitan area of München, were the only regions in the top 20 that were not in one of the three leading tourism countries.

In 18 of the 20 regions, more nights were spent in hotels and similar establishments than on campsites. In two French regions, Languedoc-Roussillon and Aquitaine, however, the opposite was true, as they attracted more tourists to campsites than to other types of accommodation.

Number of overnight stays

Tourism in Europe is concentrated in the coastal regions. The Alpine regions also saw strong demand.

Map 11.1 gives an overview of the number of overnight stays by both residents and non-residents in the regions of Europe in 2009. In addition to the six countries represented in the top 20 EU regions (Italy, Spain, France, Austria, Germany and the United Kingdom), eight more countries had NUTS 2 regions reporting more than 8 million overnight stays: the Czech Republic (Praha), Greece (Kriti and Notio Aigaiio), Cyprus, the Netherlands (Noord-Holland), Portugal (Algarve and Lisboa), Sweden (Västsvrige and Stockholm), Switzerland (Région lémanique) and Croatia (Jadranska Hrvatska).

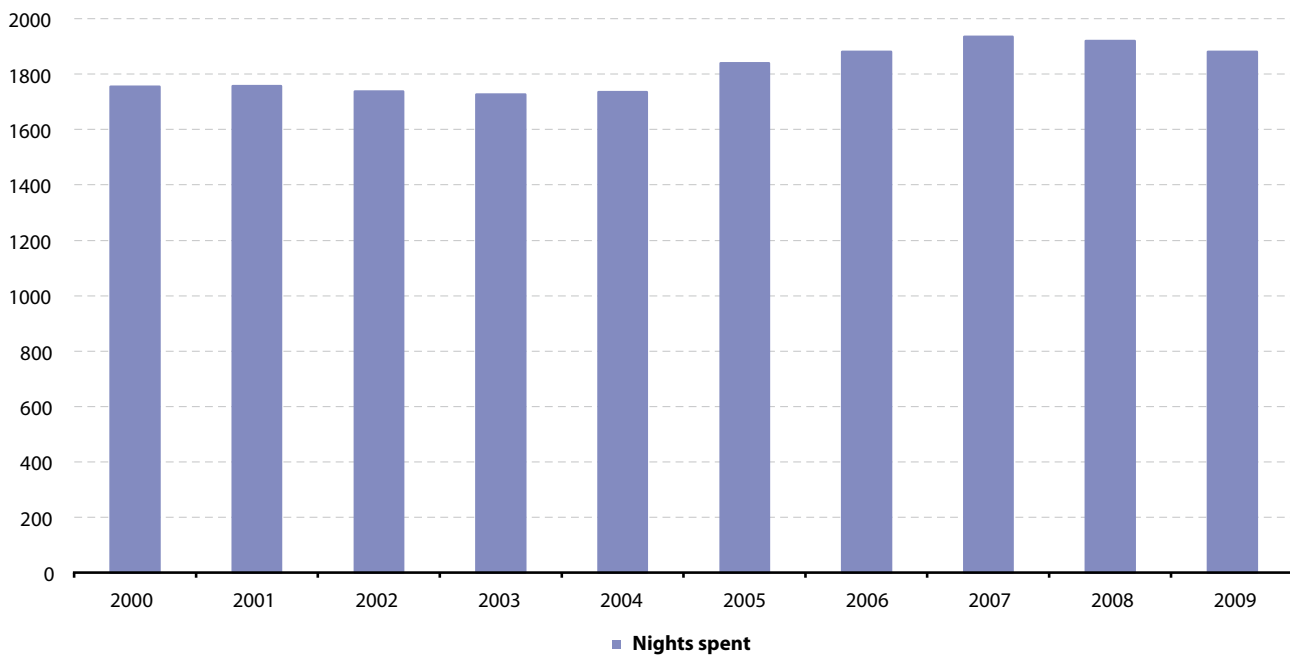
Trends in tourism over the period 2004–09

The main beneficiaries of the upswing in tourism over the period 2004–09 were regions from Poland, Lithuania, Bulgaria, Greece and the United Kingdom.

Map 11.2 shows the average annual change rate of nights spent at hotels and campsites in the period 2004–09. Tourism grew in most of the regions of the European Union over this period. Forty-four regions recorded an average annual change rate of over 5%.

However, 72 regions recorded a negative average annual change rate. Most of these regions were in France, Italy, the Czech Republic, Germany, the Netherlands, Romania and the United Kingdom.

Figure 11.1: Evolution of nights spent in hotels and campsites in EU-27, 2000–09 ⁽¹⁾
(million nights)



⁽¹⁾ Estonia, only hotels for 2000 and 2001; Ireland, only hotels for 2001; 2008 and 2009 estimated; Cyprus, only hotels for 2000 and 2002; Malta, only hotels, 2000, 2001 and 2002 estimated.
Source: Eurostat (online data code: [tour_occ_nin2](#)).

Overnight stays in campsites

In the regions of western Europe (mainly coastal regions) and Scandinavian countries, campsites are more frequently used as accommodation than in central and eastern Europe.

In 2009, overnight stays spent on campsites accounted for less than 20 % of the total number of overnight stays in all 271 regions of the EU-27 for which data were available (the remaining 80 % were hotels). Map 11.3 shows significant disparities in the ratio of camping in regions across Europe. The regions with campsites accounting for more than 40 % were concentrated in nine countries: the United Kingdom, Netherlands, France, Sweden, Denmark, Norway, Belgium, Portugal and Croatia. No regions in Bulgaria, Estonia, Lithuania, Latvia or Romania had over 5 % share of nights spent on campsites. A large majority of regions in Poland and Austria had a less than 5 % share of overnight stays spent in campsites.

Top 20 tourist regions in the EU-27 visited by foreign tourists

In 2009, the top six tourist regions in the EU-27 visited by foreign (inbound) tourists (Illes Balears, Canarias, Île-de-France, Cataluña, Inner London and Veneto) recorded as many nights of tourism as the next 14 put together.

Figure 11.4 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 accounted for more than half of all overnight stays by non-residents across the EU-27.

Nine Member States were on the list of the top 20 tourist regions visited by foreign tourists: Spain, France, the United Kingdom, Italy, Austria, Greece, Cyprus, Portugal and the Czech Republic.

Share of inbound tourism

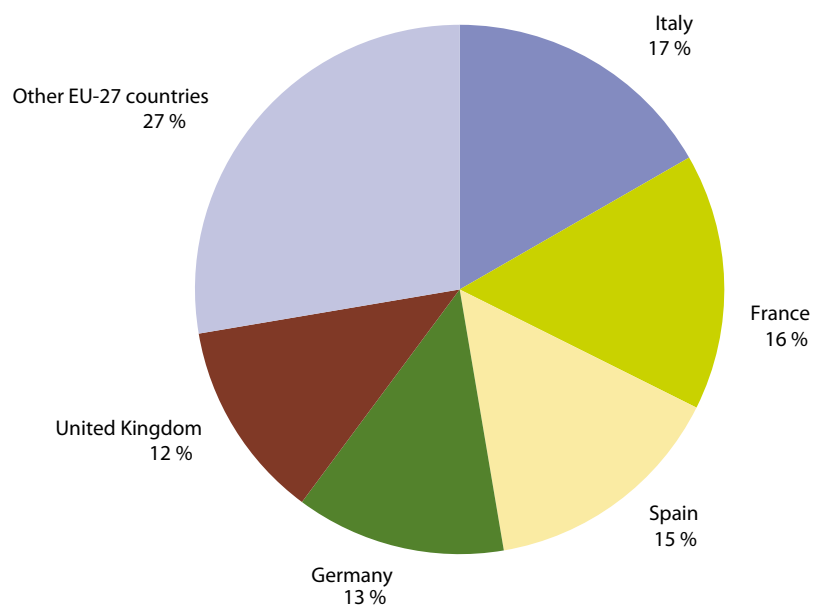
The share of inbound tourism, i.e. visits from abroad, differed very widely from region to region from around 2 % to over 97 %. Foreign overnight visitors accounted for more than 90 % of overnight stays in five EU regions in 2009: Malta, Luxembourg, the Czech region of Praha, the Greek region of Kriti and the Austrian region of Tirol. This was also true in Liechtenstein and the Croatian region of Jadranska Hrvatska.

Map 11.4 shows overnight stays by foreign visitors as a percentage of total overnight stays. Southern Europe's island regions recorded particularly high figures of foreign visitors as a percentage of total overnight stays, especially Malta, Cyprus, the Greek island regions, the Spanish Illes Balears and Canarias and the Portuguese Região Autónoma da Madeira. All of these regions recorded a share of non-resident nights above 80 %.

Inbound tourism also occupied a key position in the capital regions of some countries. This was true in Luxembourg, the Czech region of Praha, Bruxelles-Capitale/Brussels

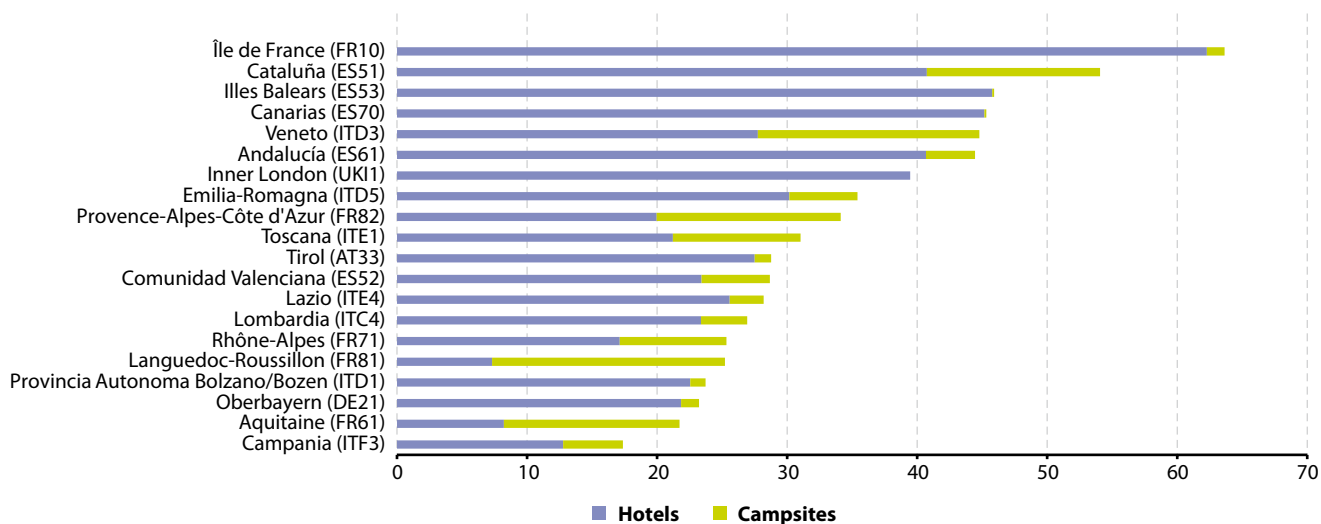


Figure 11.2: Nights spent in hotels and campsites, share per Member State in EU-27 total, 2009 (%)



Source: Eurostat (online data code: [tour_occ_nin2](#)).

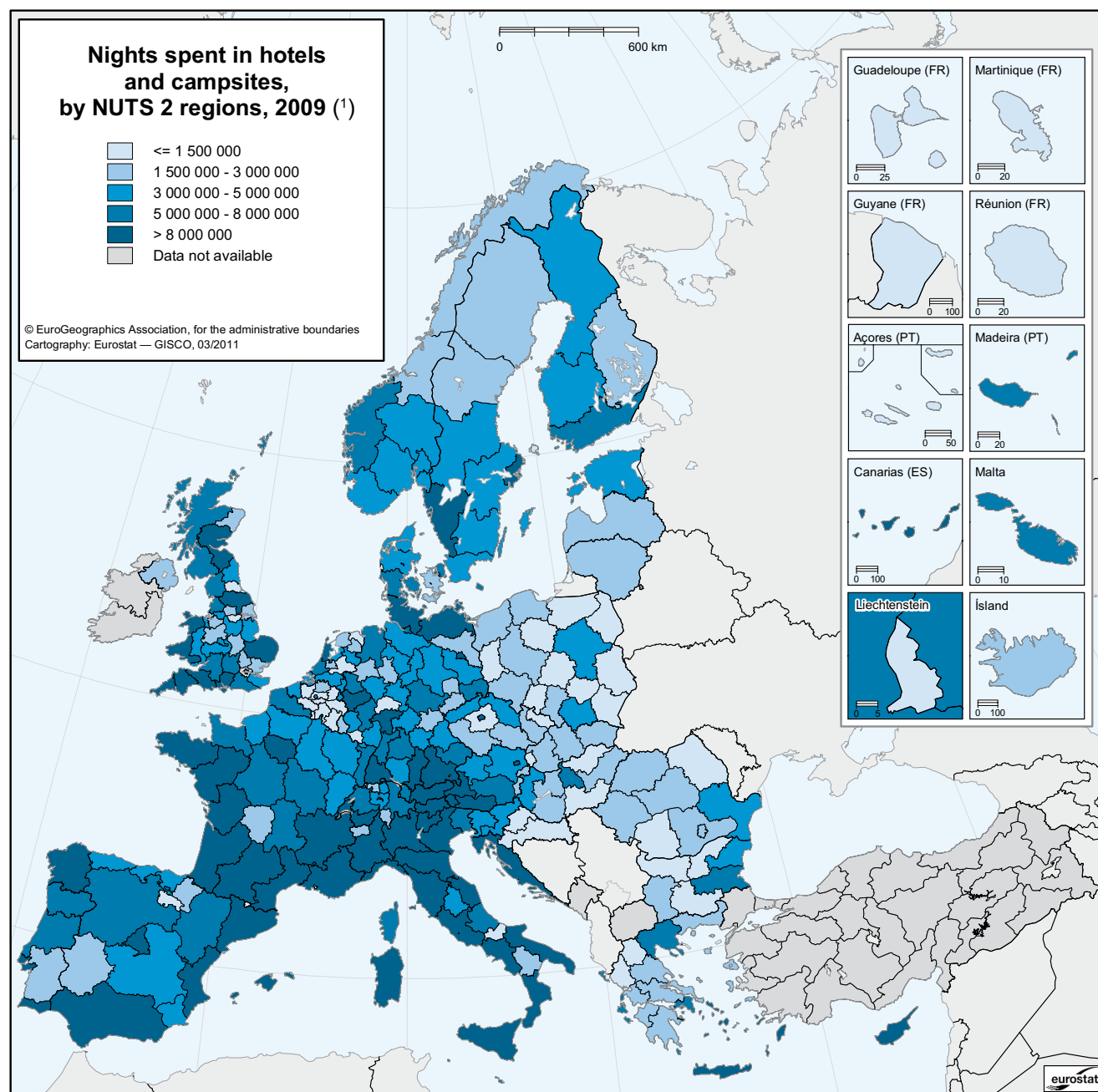
Figure 11.3: Top 20 EU-27 tourist regions, number of nights spent in hotels and campsites, by NUTS 2 regions, 2009 (million nights)



Source: Eurostat (online data code: [tour_occ_nin2](#)).



Map 11.1: Nights spent in hotels and campsites, by NUTS 2 regions, 2009 ⁽¹⁾

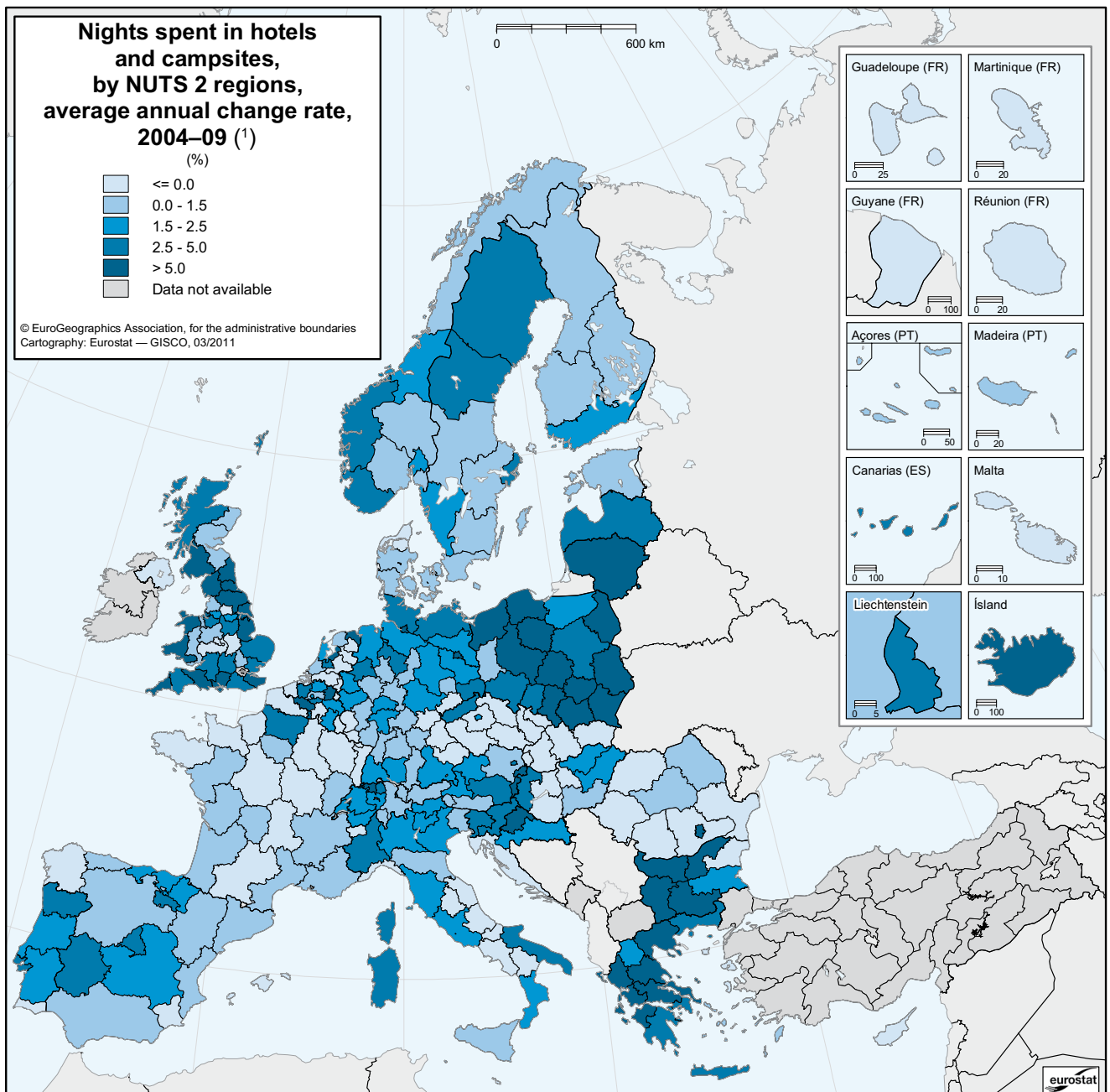


⁽¹⁾ Malta and Switzerland, hotels only.

Source: Eurostat (online data code: [tour_occ_nin2](#)).

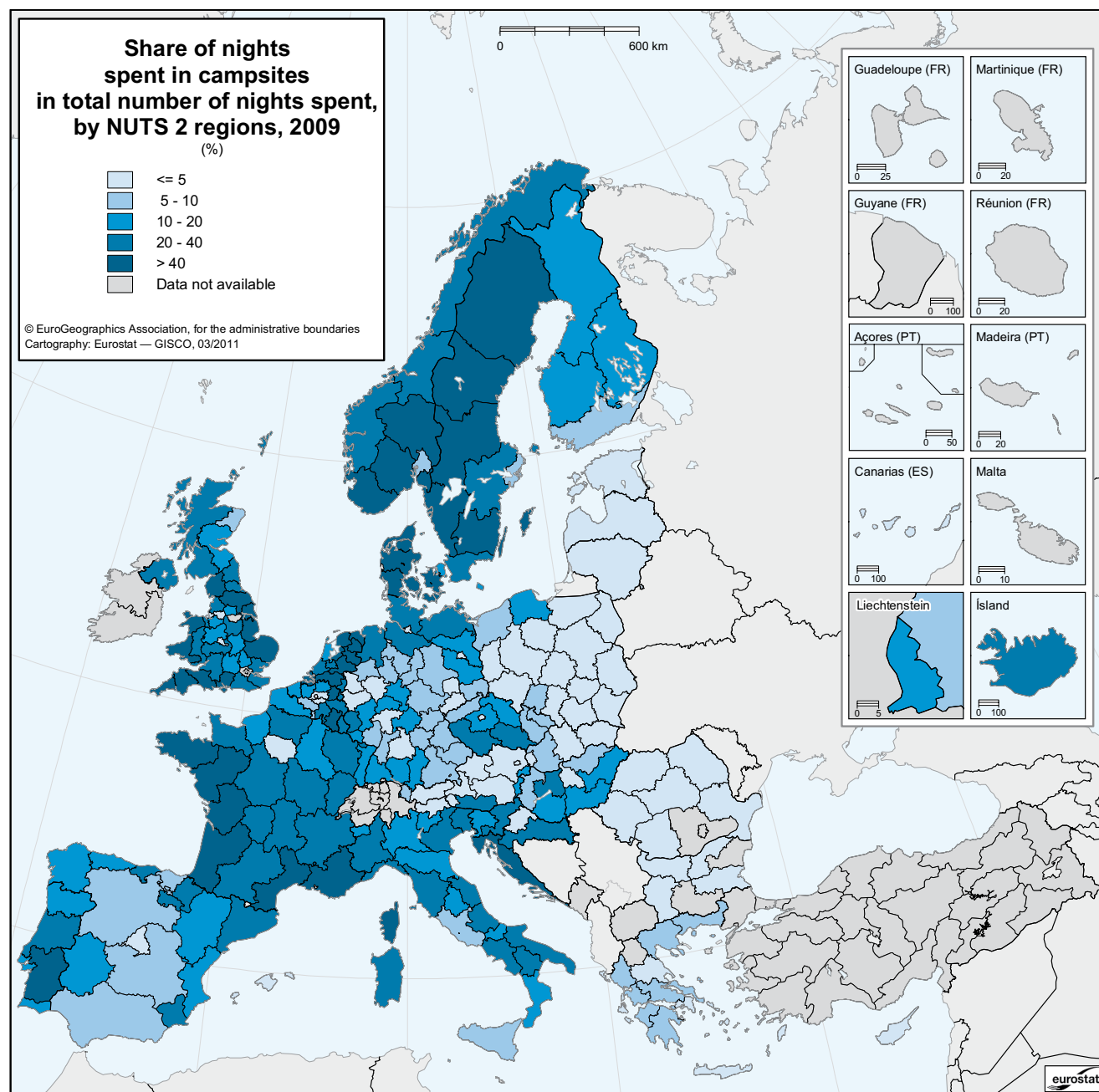


Map 11.2: Nights spent in hotels and campsites, by NUTS 2 regions, average annual change rate, 2004–09 ⁽¹⁾ (%)





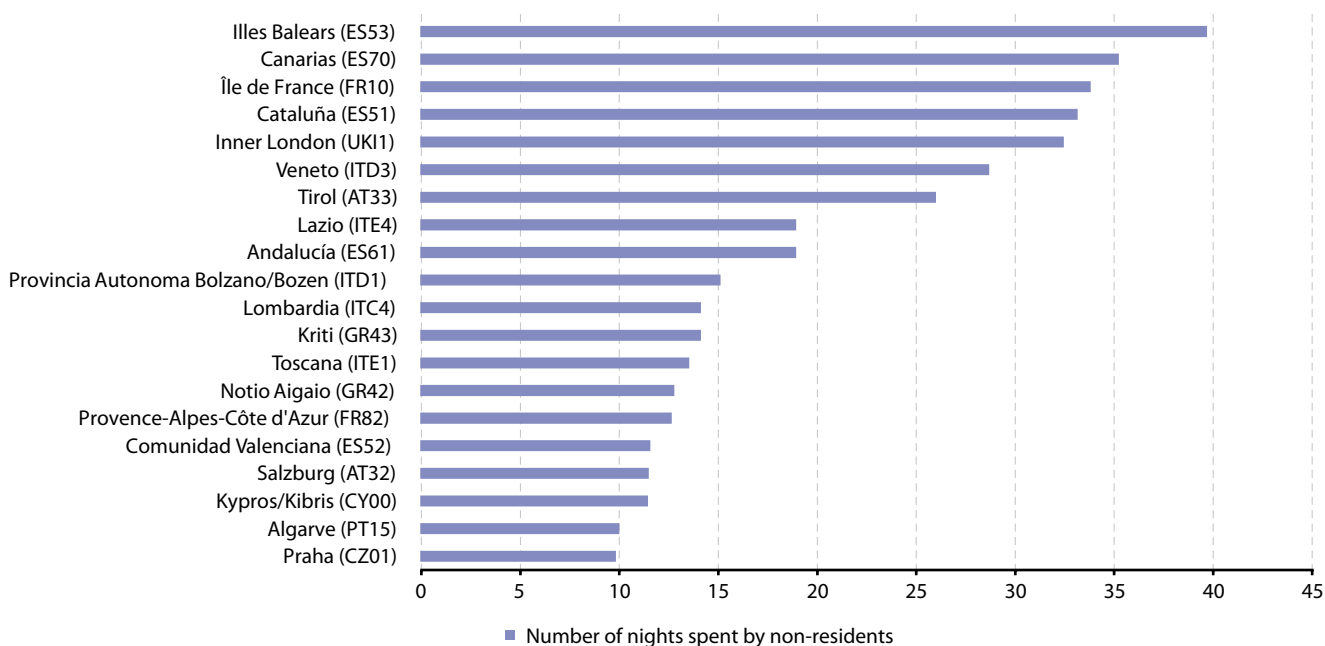
Map 11.3: Share of nights spent in campsites in total number of nights spent, by NUTS 2 regions, 2009 ⁽¹⁾
(%)



Source: Eurostat (online data code: tour_occ_nin2).



Figure 11.4: Top 20 EU-27 tourist regions, number of nights spent by non-residents in hotels and campsites, by NUTS 2 regions, 2009 (million nights)



Source: Eurostat (online data code: [tour_occ_nin2](#)).

Hoofdstedelijk Gewest in Belgium, Inner London in United Kingdom, the region of Közép-Magyarország in Hungary and Wien in Austria. All of these regions recorded a share of non-resident nights above 80 %.

Domestic tourism: most popular regions

Resident tourists most often visit regions near the seaside. In 2009, this was the case for 15 out of the 24 countries (including five land-locked countries) for which a regional breakdown was available.

Table 11.1 shows the region where residents from the same country spent the highest number of overnight stays in hotels or on campsites. The seaside was generally the most popular destination for domestic tourism but in France, Germany and Poland, residents spent the highest number of nights in the capital region. In Austria, Switzerland, Slovakia and the Czech Republic, mountain regions were the most popular.

In most regions, the share of the most popular region in 2009 remained more or less unchanged compared to 2004. However, the regions of Prov. West-Vlaanderen in Belgium and Jadranska Hrvatskalost in Croatia lost ground compared to 2004 while the regions of Kentriki Makedonia in Greece, Nyugat-Dunántúl in Hungary and Noord-Holland in the Netherlands gained ground.

Average length of stay: hotel versus campsites

The longest average visitor trips in campsites are observed mainly in coastal regions while the longest average visitor stays in hotels are mainly in island regions.

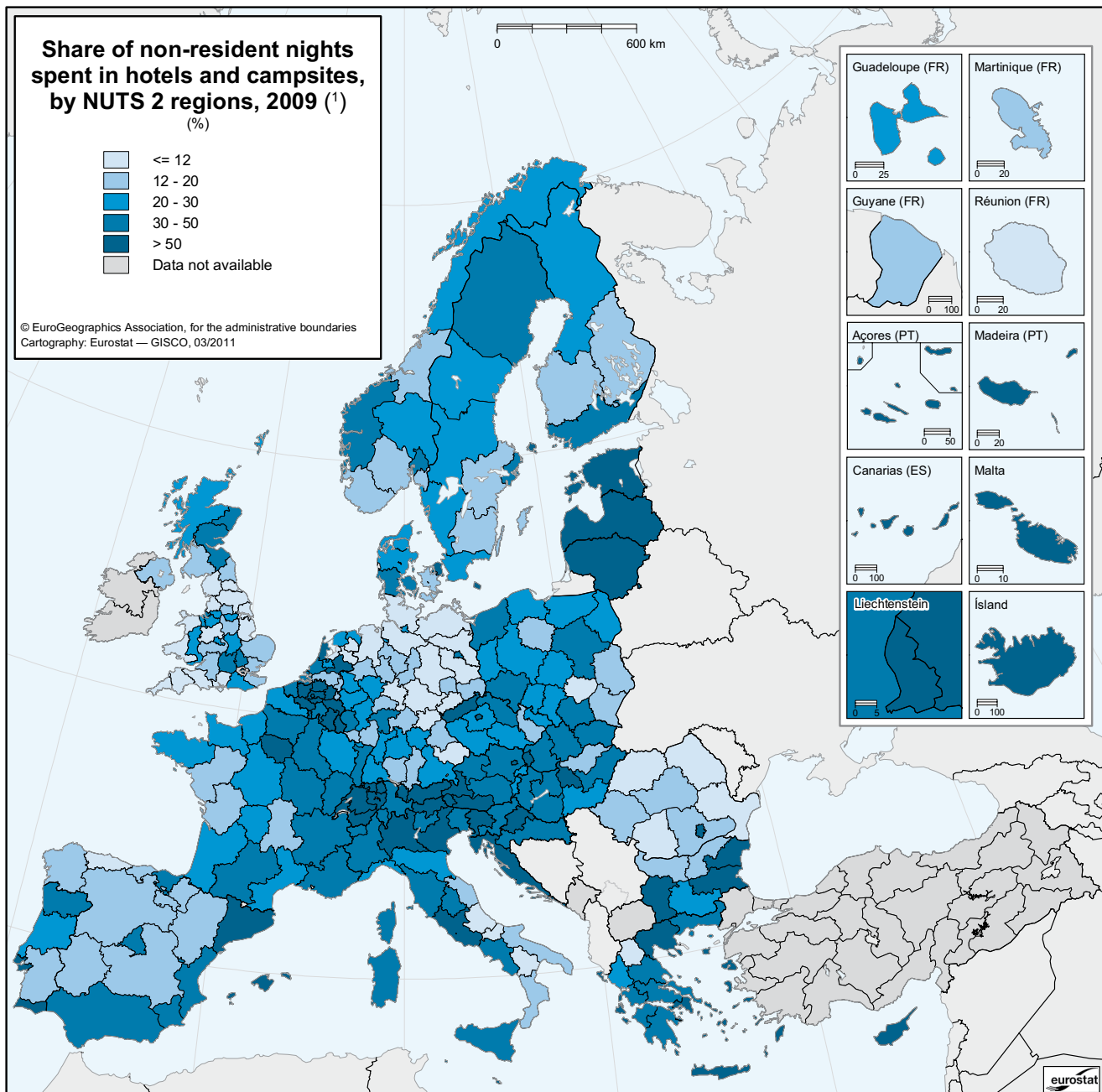
Maps 11.5 and 11.6 show the NUTS 2 regions in Europe by average length of trip of visitors in hotels and campsites in 2009. Unsurprisingly, visitors tended to stay longer in campsites than in hotels. The EU average length of stay in campsites was 4.0 nights compared to 2.5 nights in hotels.

Long stays in hotels were mainly observed in island regions. Out of 12 regions recording an average length of stays in hotels of more than five nights, nine were island regions (Canarias, Illes Balears, Malta, Região Autónoma da Madeira, Kypros/Kibris and four Greek island regions). Long stays in hotels were also recorded in mountain regions (mainly Austria) and in central and eastern European countries (Bulgaria, Poland, Hungary, Slovenia, Slovakia and Romania).

Long stays in campsites were mainly observed in coastal regions: this was quite clear in Italy and France and to a lesser extent in Spain (mainly the Mediterranean coast). In Italy, out of 21 regions, only two recorded an average length of stays shorter than five nights: Sicilia and Valle d'Aosta/Vallée d'Aoste. In France, all the regions of the



Map 11.4: Share of non-resident nights spent in hotels and campsites, by NUTS 2 regions, 2009 ⁽¹⁾
(%)



⁽¹⁾ Malta and Switzerland, hotels only.

Source: Eurostat (online data code: [tour_occ_nin2](#)).



Table 11.1: Most popular tourist region per country (domestic tourism), number of nights spent by residents in hotels and campsites, by NUTS 2 regions, 2009 ⁽¹⁾

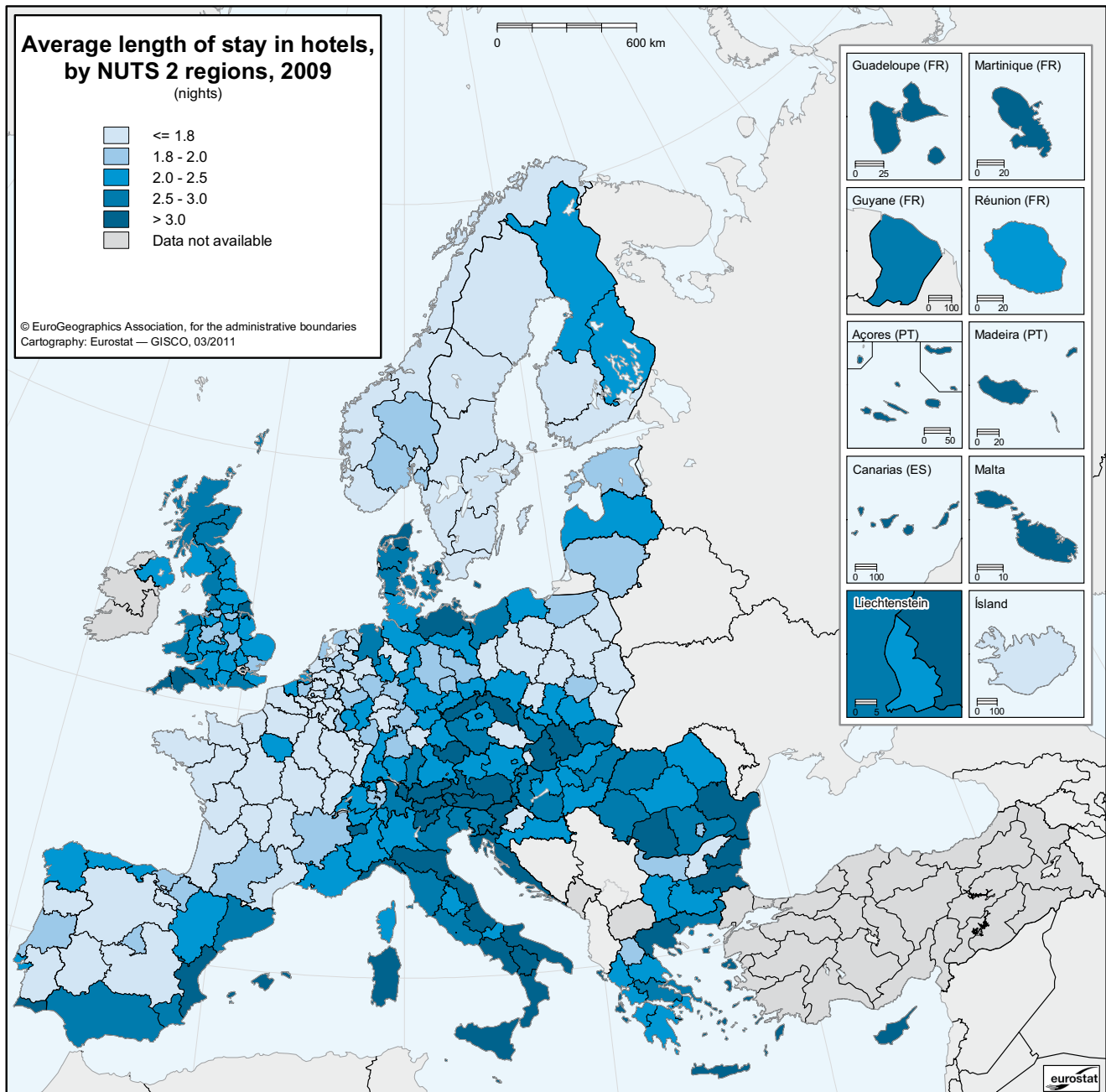
	Resident nights in the country (million nights)	Most popular tourist region		
		Region	Regional share (%)	Regional share, 2004 (%)
Belgium	6.76	Prov. West-Vlaanderen (BE25)	34	41
Bulgaria	4.69	Yugoiztochen (BG34)	23	22
Czech Republic	11.36	Severovýchod (CZ05)	24	23
Denmark	14.73	Syddanmark (DK03)	31	30
Germany	194.10	Oberbayern (DE21)	9	9
Estonia	1.09		–	–
Ireland	9.96	Southern and Eastern (IE02)	68	67
Greece	19.35	Kentriki Makedonia (GR12)	19	15
Spain	126.46	Andalucía (ES61)	20	20
France	195.98	Île de France (FR10)	15	14
Italy	178.47	Emilia-Romagna (ITD5)	15	15
Cyprus	1.33		–	–
Latvia	0.66		–	–
Lithuania	0.80		–	–
Luxembourg	0.11		–	–
Hungary	7.72	Nyugat-Dunántúl (HU22)	25	21
Malta ⁽¹⁾	0.35		–	–
Netherlands	33.68	Noord-Holland (NL32)	17	13
Austria	23.32	Steiermark (AT22)	20	20
Poland	17.53	Mazowieckie (PL12)	14	15
Portugal	18.34	Algarve (PT15)	25	26
Romania	14.11	Sud-Est (RO22)	28	30
Slovenia	2.85	Vzhodna Slovenija (SI01)	59	60
Slovakia	3.63	Stredné Slovensko (SK03)	38	36
Finland	12.73	Etelä-Suomi (FI18)	37	36
Sweden	31.29	Västverige (SE23)	24	23
United Kingdom	166.14	Dorset and Somerset (UKK2)	6	4
Iceland	0.73		–	–
Liechtenstein	0.004		–	–
Norway	19.61	Sør-Østlandet (NO03)	20	22
Switzerland ⁽¹⁾ ⁽²⁾	15.45	Ostschweiz (CH05)	27	28
Montenegro	:		–	–
Croatia	2.92	Jadranska Hrvatska (HR03)	77	82
FYR of Macedonia	0.39		–	–
Turkey	:		:	:

⁽¹⁾ Switzerland and Malta, hotels only.

⁽²⁾ Switzerland, regional share, 2005.

Source: Eurostat (online data code: [tour_occ_nin2](#)).

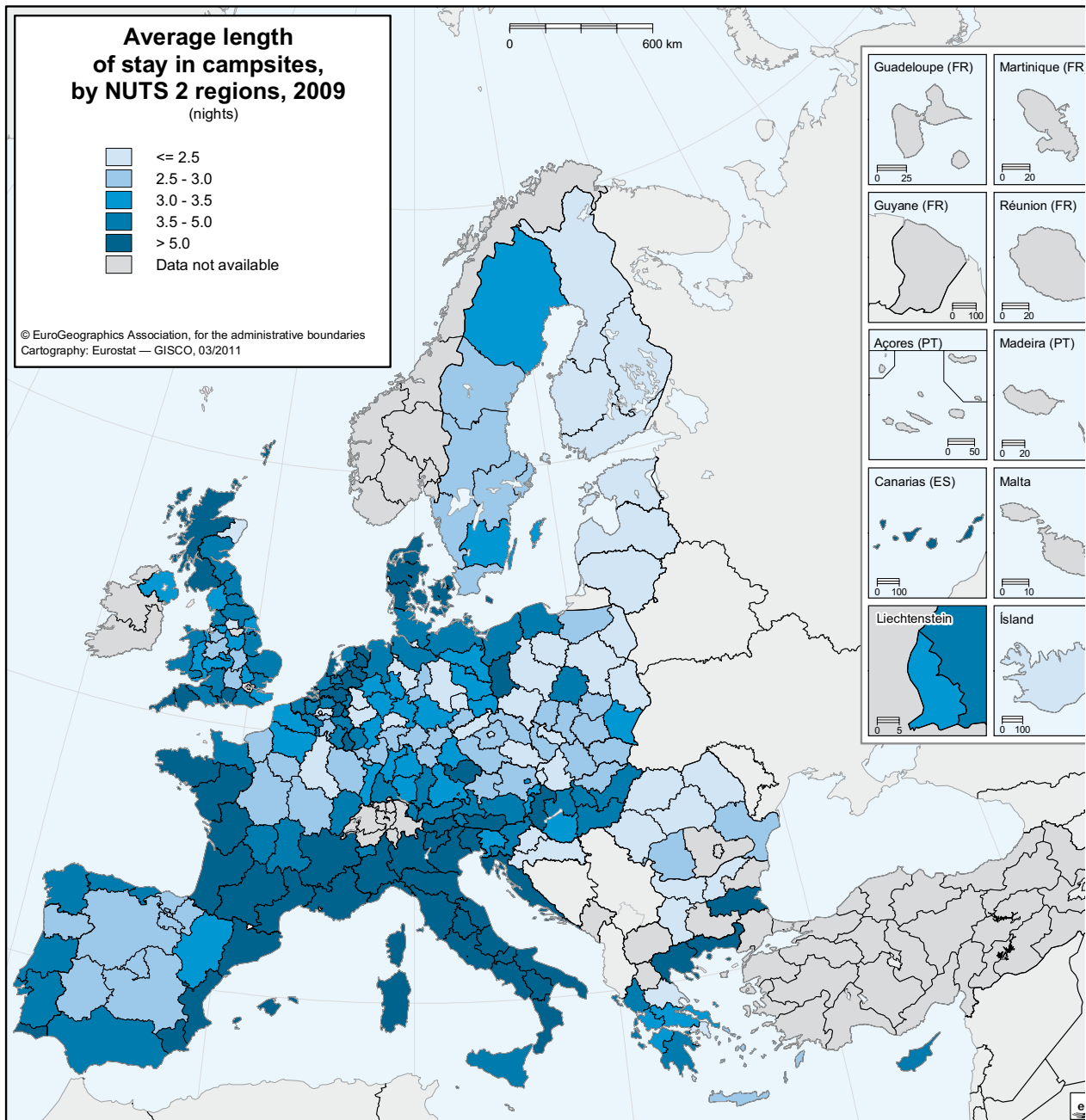
Map 11.5: Average length of stay in hotels, by NUTS 2 regions, 2009 (nights)



Source: Eurostat (online data code: [tour_occ_nin2](#); [tour_occ_arn2](#)).

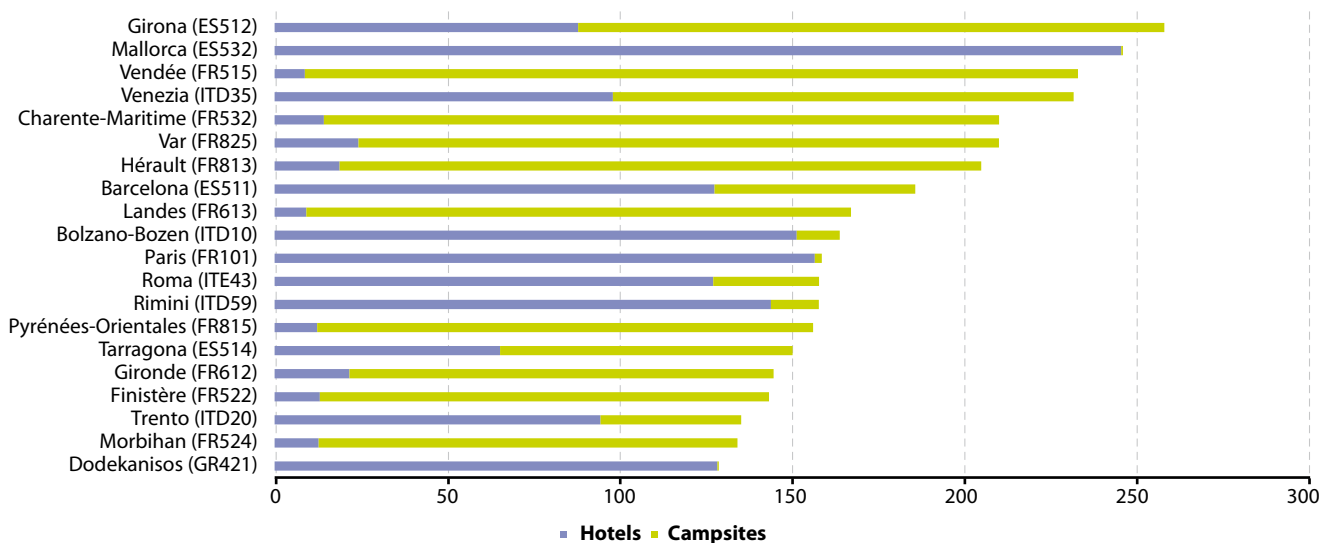


Map 11.6: Average length of stay in campsites, by NUTS 2 regions, 2009
(nights)



Source: Eurostat (online data code: [tour_occ_nin2](#) and [tour_occ_arn2](#)).

Figure 11.5: EU-27 top 20 regions by accommodation capacity, number of bed places in hotels and campsites, by NUTS 3 regions, 2009
(1 000 bed places)



Source: Eurostat (online data code: [tour_cap_nuts3](#)).

Mediterranean and Atlantic coast recorded an average length of trips longer than five nights. Long stays in campsite were also recorded in Denmark, the Benelux countries, Austria, Hungary and the United Kingdom.

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. Average lengths of stay can also indicate the extent to which tourism is important to a region.

Top 20 regions by accommodation capacity

Ten out of the top 20 regions (NUTS 3 level) ranked according to their accommodation capacity in hotels and campsites were in France in 2009. The other regions were all in Spain or Italy, with one exception in 20th place: the Greek region of Dodekanisos.

Figure 11.5 shows the 20 regions at NUTS 3 level in the European Union with the highest number of bed places, broken down by hotels and campsites. These regions account for 16.1 % of the total number of bed places in all 271 regions of the EU-27 for which data were available.

In these top 20 regions, campsites accounted for 56.3 % of all bed places. The share reached 83.4 % in France.

Accommodation capacity in hotels

Ten regions offer more than 100 000 bed places in hotels: four Spanish regions (Mallorca, Barcelona, Madrid, Málaga), three in Italy (Bolzano/Bozen, Rimini, Roma), one in France (Paris), one in Greece (Dodekanisos) and one in England (Inner London — West).

Map 11.7 gives an overview of the number of bed places in hotels by NUTS 3 regions in 2009. Regions with a high number of bed places in hotels (> 10 000 places) tallied with the regions recording a high number of overnight stays. They were mainly concentrated around the coastal and Alpine regions.

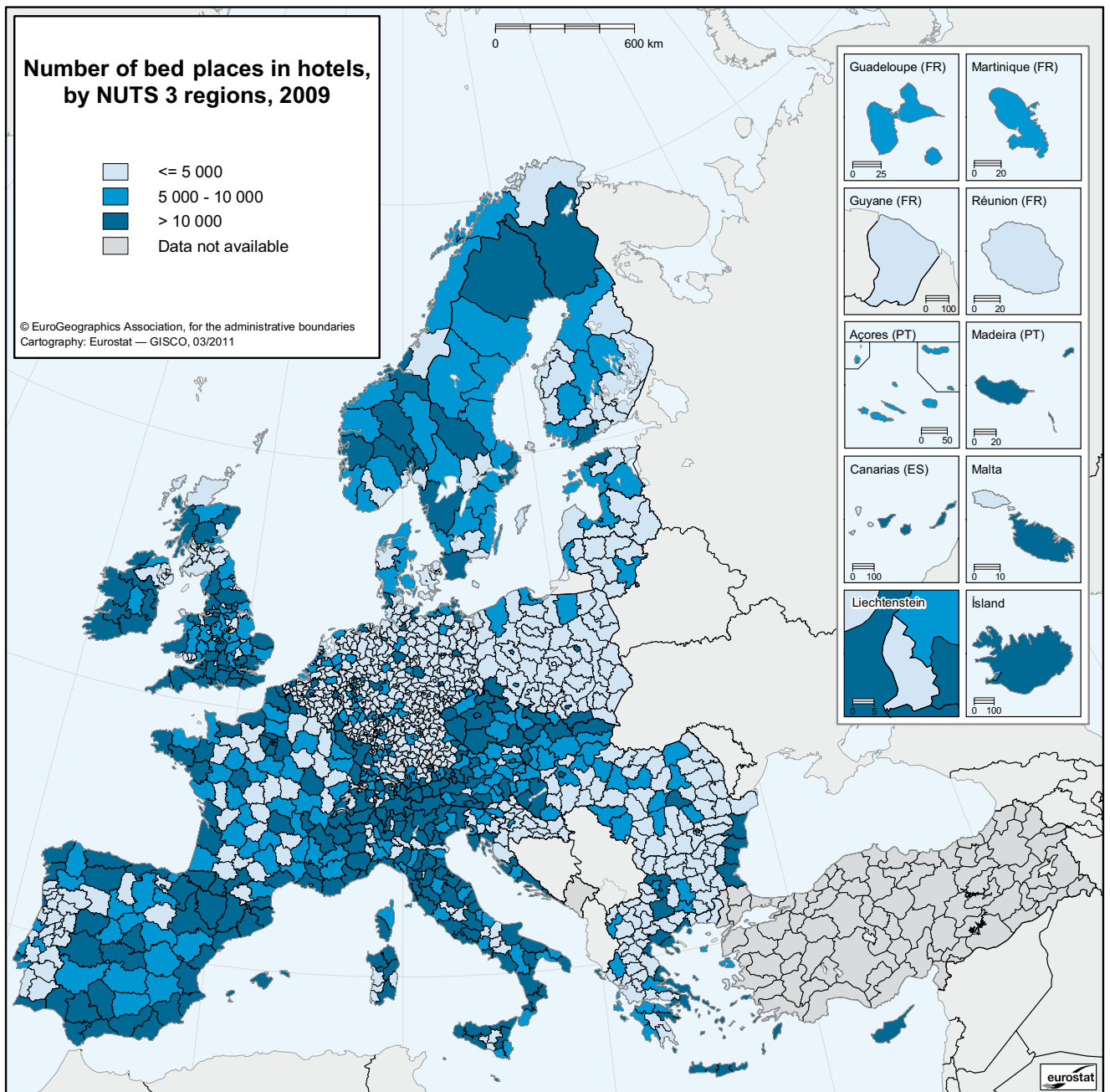
Map 11.8 shows the average number of bed places by NUTS 3 regions in 2009. Big establishments were mainly concentrated in regions of Denmark, other Scandinavian countries and the Mediterranean coast of Spain and also in island regions. As the data collection systems have not been harmonised, the results can be biased and must be analysed with caution. Some countries collect data from all establishments while others only collect data from establishments with a number of bed places above a specific threshold (e.g. 40 bed places for Denmark).

Conclusion

According to the UN World Tourism Organisation, Europe is the most frequently visited region in the world. In 2009,



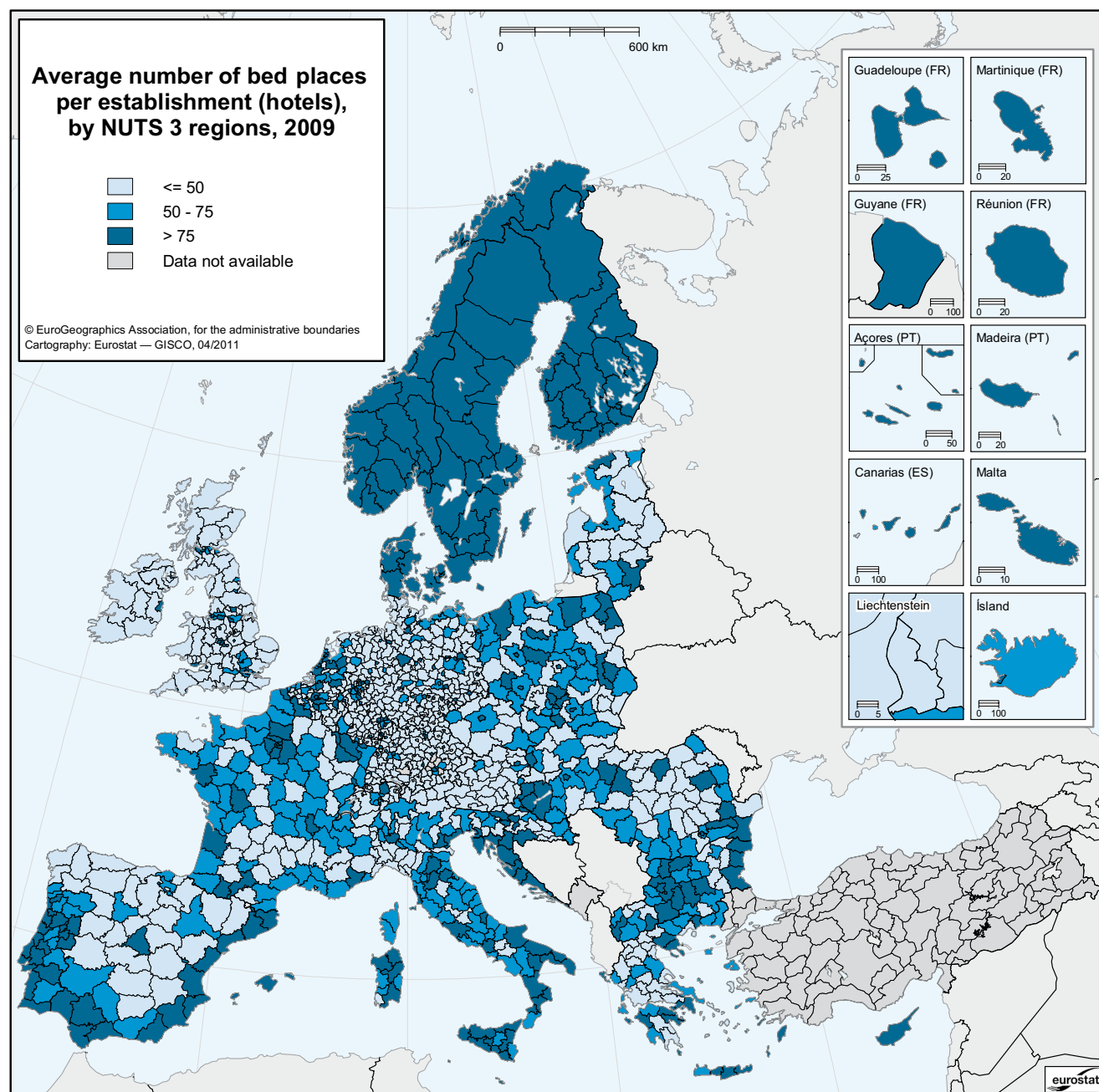
Map 11.7: Number of bed places in hotels, by NUTS 3 regions, 2009



Source: Eurostat (online data code: [tour_cap_nuts3](#)).



Map 11.8: Average number of bed places per establishment (hotels), by NUTS 3 regions, 2009



Source: Eurostat (online data code: [tour_cap_nuts3](#)).



five of the top 10 countries for visitors in the world were European Union Member States. The wealth of its cultures, the variety of its landscapes and the exceptional quality of its tourist infrastructure are likely to be part of the explanation. Enlargement hugely enriched the EU's tourism potential by enhancing cultural diversity and providing interesting new destinations to discover.

An 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.

Data sources and availability

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 bed places) 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 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 are keen to combine both aspects by emphasising the attractiveness of conference locations as tourist destinations in their own right and feature these services in marketing activities.

The tourism statistics presented in this chapter cover only 'hotels and similar establishments' and 'tourist campsites'. Statistics on '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 is still limited, particularly at regional level.

Context

Tourism is an important and fast-evolving economic activity with social, cultural and environmental implications, involving large numbers of small and medium-sized businesses. Its contribution to growth and employment varies widely from one region of the EU to another. In rural regions that are 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. The Lisbon Treaty acknowledges the importance of tourism, outlining a specific competence for the European Union in this field.

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

Inbound tourism, i.e. visits from abroad, is of particular interest to 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 trips 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.