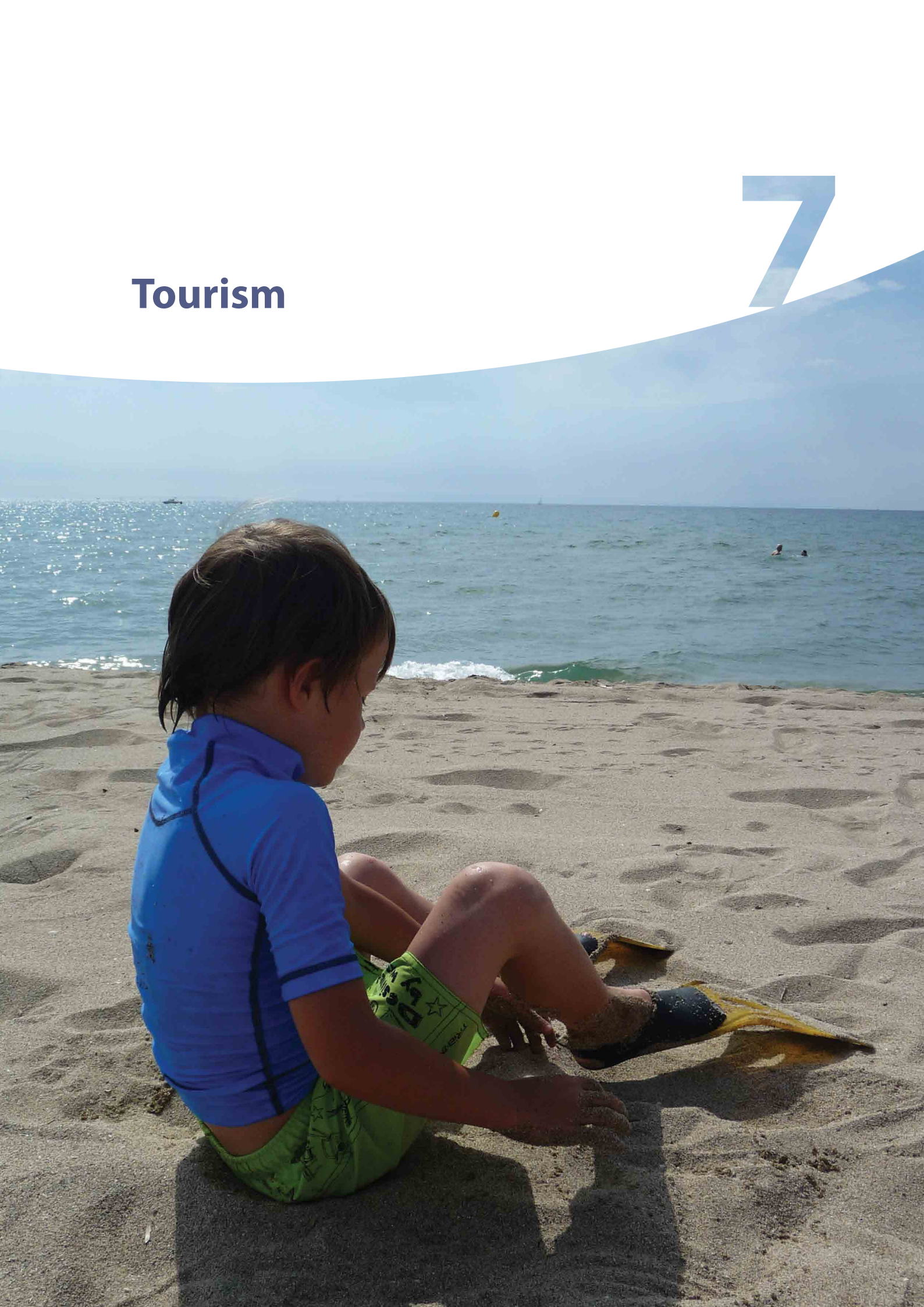


Tourism

7





This chapter presents regional patterns of tourism in the **European Union (EU)** for 2010; its main focus is tourism occupancy within tourist accommodation establishments, while it also presents figures on the capacity of tourist accommodation across EU regions. The number of overnight stays, which reflects both the length of stay and the number of visitors, is considered a key indicator for accommodation statistics.

Coastal regions are very important for tourism in many EU Member States. Chapter 13, which is dedicated to coastal regions, provides a specific focus on tourism and on transport.

Main statistical findings

According to the United Nations World Tourism Organisation, Europe is the most frequently visited region in the world. In 2009, five of the top 10 countries for visitors in the world were EU Member States. The wealth of European cultures, the variety of its landscapes and the exceptional quality of its tourist infrastructure are likely to be among many of the reasons why tourists choose to take their holidays in Europe.

Number of overnight stays

There were 2 233 million nights spent in hotels, campsites and other collective accommodation establishments (the latter includes tourist dwellings) across the EU-27 in 2009, of which 1 331 million were by domestic tourists in their own country of residence.

Map 7.1 gives an overview of the number of overnight stays by, both, residents and non-residents in 2010. Tourism in the EU is often concentrated in coastal regions, although the Alpine regions and some cities also experience high demand. A total of 54 regions (and Ireland for which no regional analysis is available) in the EU-27 recorded more than 10 million nights spent in hotels, campsites and other collective accommodation establishments, among which 20 regions recorded more than 24 million nights. This top 20 list included six regions from Italy, five each from Spain and France, two from Germany and one each from Austria and the United Kingdom; note that Ireland as a whole recorded 33.7 million overnight stays.

The top 20 tourist regions (excluding Ireland) are shown in Figure 7.1, with an analysis between the different types of accommodation. These 20 regions together accounted for 38.3% of all overnight stays in the 270 regions of the EU-27 for which data are available. The Spanish island region of the Canarias and the French capital city region of Île-de-France had by far the highest numbers of overnight stays, 79.1 million and 74.0 million respectively. They were followed by: the Spanish region of Cataluña, which includes Barcelona, the Costa Brava and Costa Dorada (65.1 million); the Italian region of Veneto, which includes Venice (60.8 million);

and another Spanish region, the Illes Balears, which includes the main island destinations of Mallorca, Menorca, Eivissa (Ibiza) and Formentera (58.2 million). Almost one in seven tourism nights spent in the EU was spent in one of these five regions. Inner London in the United Kingdom (eighth place), Tirol in Austria (16th place) and the German regions of Oberbayern (18th place) and Mecklenburg-Vorpommern (20th place), were the only regions in the top 20 that were not in one of the three leading tourism Member States. Jadranska Hrvatska (Croatia) recorded 34.9 million overnight stays in 2010, which was between the levels recorded by the regions ranked 12th and 13th in the EU.

In 14 of the top 20 regions in the EU, more than half of the nights were spent in hotels and similar establishments. The regions with the largest number of overnight stays in hotels in 2010 were the capital city regions of the Île de France and Inner London, alongside the Spanish regions of the Canarias, Illes Balears, Cataluña and Andalucía, all with more than 40 million overnight stays; the top 20 region with the highest proportion of nights spent in hotels was Tirol in Austria (91.2%). Among the six remaining top 20 regions (four southern French regions, Veneto in Italy and Mecklenburg-Vorpommern in Germany) a majority of the nights spent by tourists were in campsites and other types of collective accommodation. Overall, the regions with the highest number of overnight stays on campsites were the French regions of Languedoc-Roussillon, Aquitaine, Provence-Alpes-Côte d'Azur and the Pays de la Loire (the latter was not one of the top 20 regions), as well as Veneto in Italy and Cataluña in Spain, all with more than 10 million overnight stays on campsites; note that Jadranska Hrvatska (Croatia) also recorded more than 10 million overnight stays on campsites. The top two tourist regions for other collective accommodation establishments were the Canarias (Spain) and Rhône-Alpes (France), both with more than 20 million overnight stays.

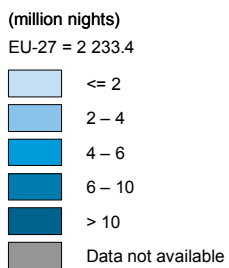
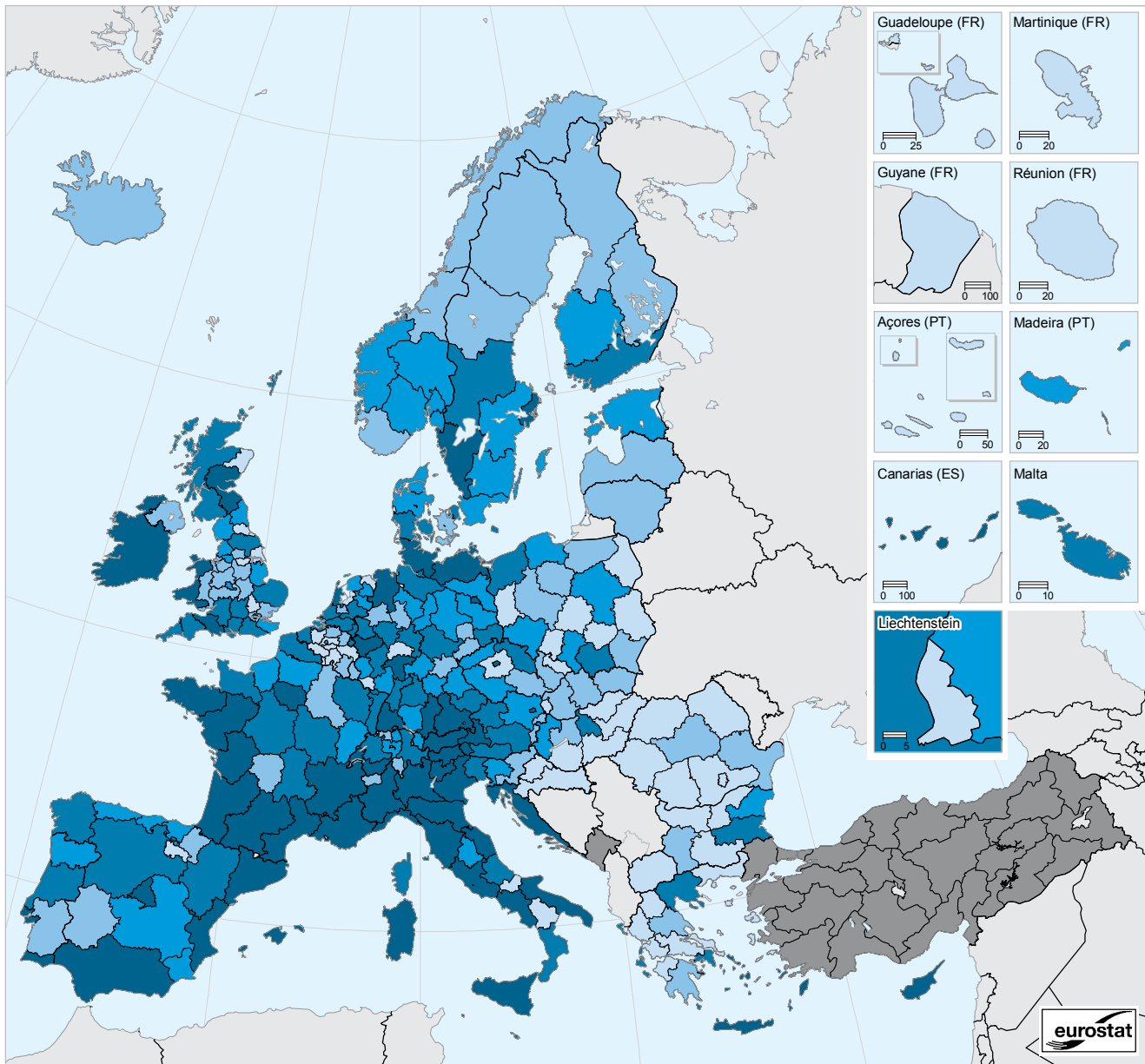
Recent trends in tourism

Maps 7.2 and 7.3 show the annual average rate of change in the number of nights spent in hotels and on campsites during the period 2007–10. In the EU-27, this measure of tourism showed an average fall of 2.2% per year for hotels and a rise of 2.3% per year for campsites. It is likely that the different developments observed for hotels and campsites can be linked to the financial and economic crisis, and the substitution of nights spent in hotels by nights spent in campsites may have been in order to lower the cost of a holiday.

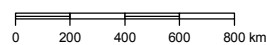
Concerning hotels, this measure of tourism fell in 145 of the 268 regions with data available, with average reductions of 4% or more per annum in 47 regions and losses of 10% or more in nine regions. Several of the regions with large falls were in France, Romania and the United Kingdom, with the largest reduction (–16.5% per annum) in the French region of Guadeloupe. Among the regions in the EFTA countries,



Map 7.1: Nights spent in hotels, campsites and other collective accommodation establishments, by NUTS 2 regions, 2010 ⁽¹⁾ (million nights)



Administrative boundaries: © EuroGeographics © UN-FAO © Turkstat
 Cartography: Eurostat — GISCO, 04/2012

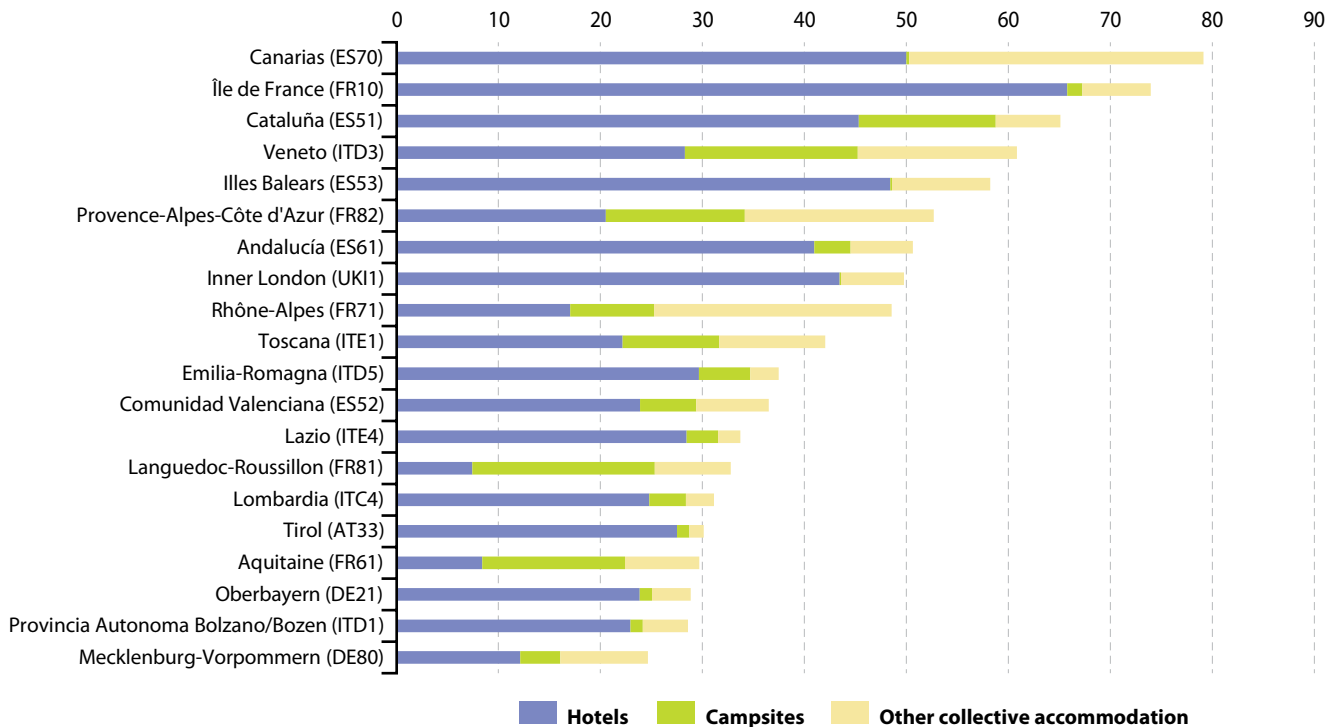


⁽¹⁾ Nord-Est (ITD), Centro (ITE) and Hungary, provisional; EU-27 and Luxembourg, 2009; Ireland, 2006; Switzerland, hotels and campsites only; Ciudad Autónoma de Ceuta (ES63), Ciudad Autónoma de Melilla (ES64), Guadeloupe (FR91), Martinique (FR92), Guyane (FR93) and Réunion (FR94), hotels only; Ireland, national level.

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



Figure 7.1: Top 20 EU-27 tourist regions, number of nights spent in hotels, campsites and other collective accommodation establishments, by NUTS 2 regions, 2010 ⁽¹⁾ (million nights)



⁽¹⁾ Veneto (ITD3), Toscana (ITE1), Emilia-Romagna (ITD5), Lazio (ITE4) and Provincia Autonoma Bolzano/Bozen (ITD1), provisional.
Source: Eurostat (online data code: [tour_occ_nin2](#))

the largest fall was –4.9% per annum in the Norwegian region of Hedmark og Oppland. All four regions in Croatia and the former Yugoslav Republic of Macedonia recorded a reduction in their respective number of nights spent in hotels, but the Croatian region of Središnja i Istočna (Panonska) Hrvatska was the only one to record an average decline in excess of 5% per annum.

In contrast, 54 regions in the EU recorded an annual average increase in excess of 2%, among which 16 recorded average growth above 5% per annum, but only the Dutch region of Flevoland recorded growth in excess of 10%. Six of the regions with average growth above 5% were in Poland and three each in Belgium and Germany, two in the United Kingdom and one each in Italy and the Netherlands.

Camping

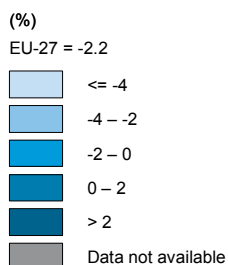
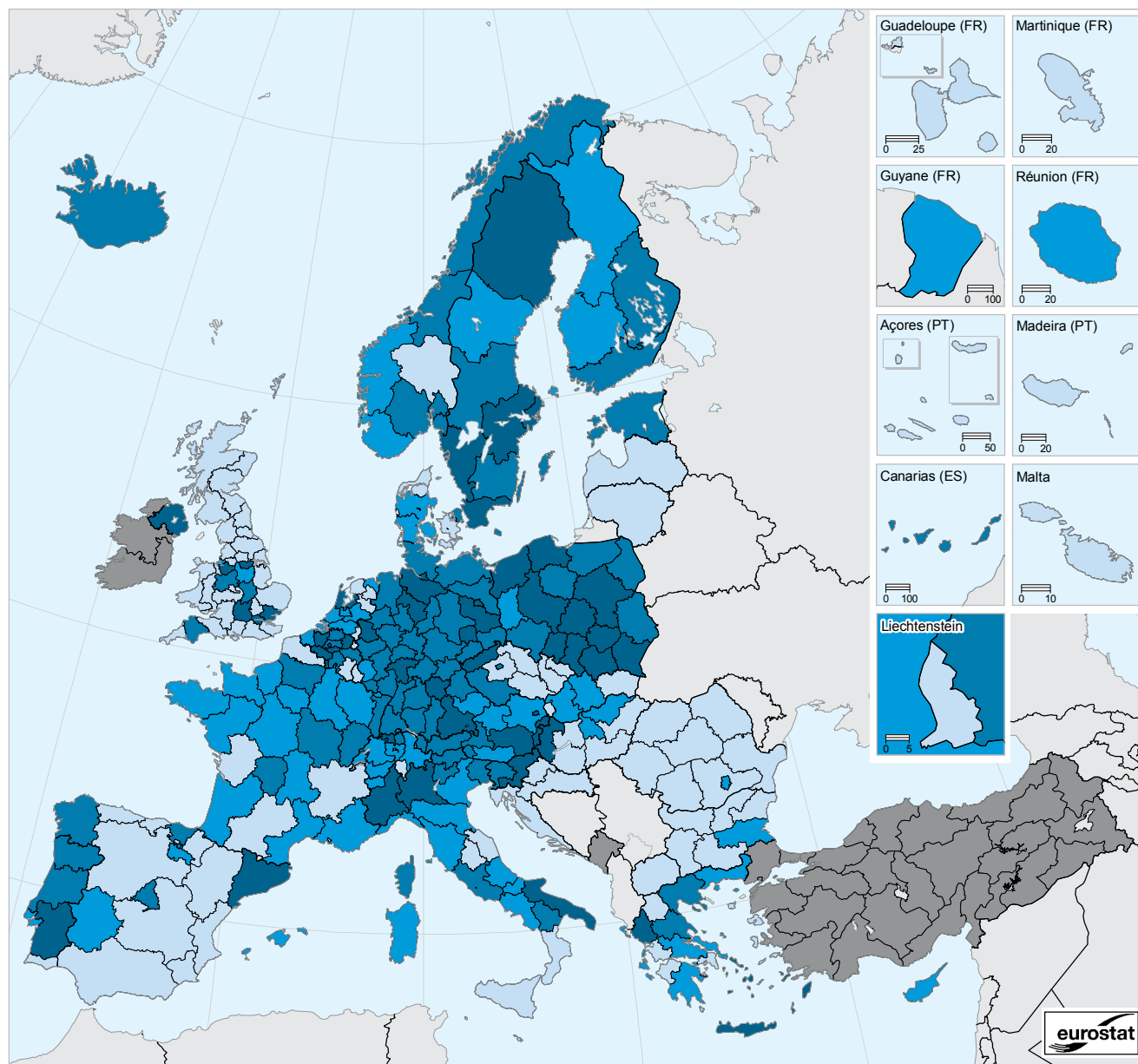
A more varied development could be seen for campsites (see Map 7.3), with a much wider range in the rates of change between 2007 and 2010. The number of nights spent on campsites fell by an average of 8% or more per annum in 47 of the 248 regions for which data are available; among these there were reductions of 20% or more per annum in 17 regions, with the largest decline recorded for the Bulgarian region of

Yugoiztochen (–52.3% per annum). The regions where the number of nights spent in campsites fell by 20% or more per year were spread across eight Member States, but included several capital city regions, notably those in the Czech Republic, Spain and Slovakia. In contrast, 47 regions recorded an annual average increase in excess of 4%, among which 20 regions posted growth averaging more than 10% per annum. The fastest average growth was also recorded in Bulgaria, 129.8% in the region of Severozapaden; this high growth rate was recorded from a very low number of nights spent on campsites. Four of the regions with average growth above 10% were in Poland, three each in Germany, Greece and the United Kingdom, two in Bulgaria and one each in Belgium, Cyprus, Spain, Italy and the Netherlands.

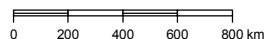
In the regions of western Europe (mainly coastal), particularly in Scandinavian countries, campsites were more frequently used as tourist accommodation than in central and eastern Europe. Taking an average across the 257 regions of the EU-27 for which data are available, around one in six of all overnight stays were spent on campsites, with the remaining five out of six in hotels and other collective accommodation establishments. Map 7.4 shows significant disparities in the regional share of camping: regions with campsites accounting for more than 30% of the total nights spent in



Map 7.2: Nights spent in hotels, by NUTS 2 regions, average annual change, 2007–10 ⁽¹⁾
(%)



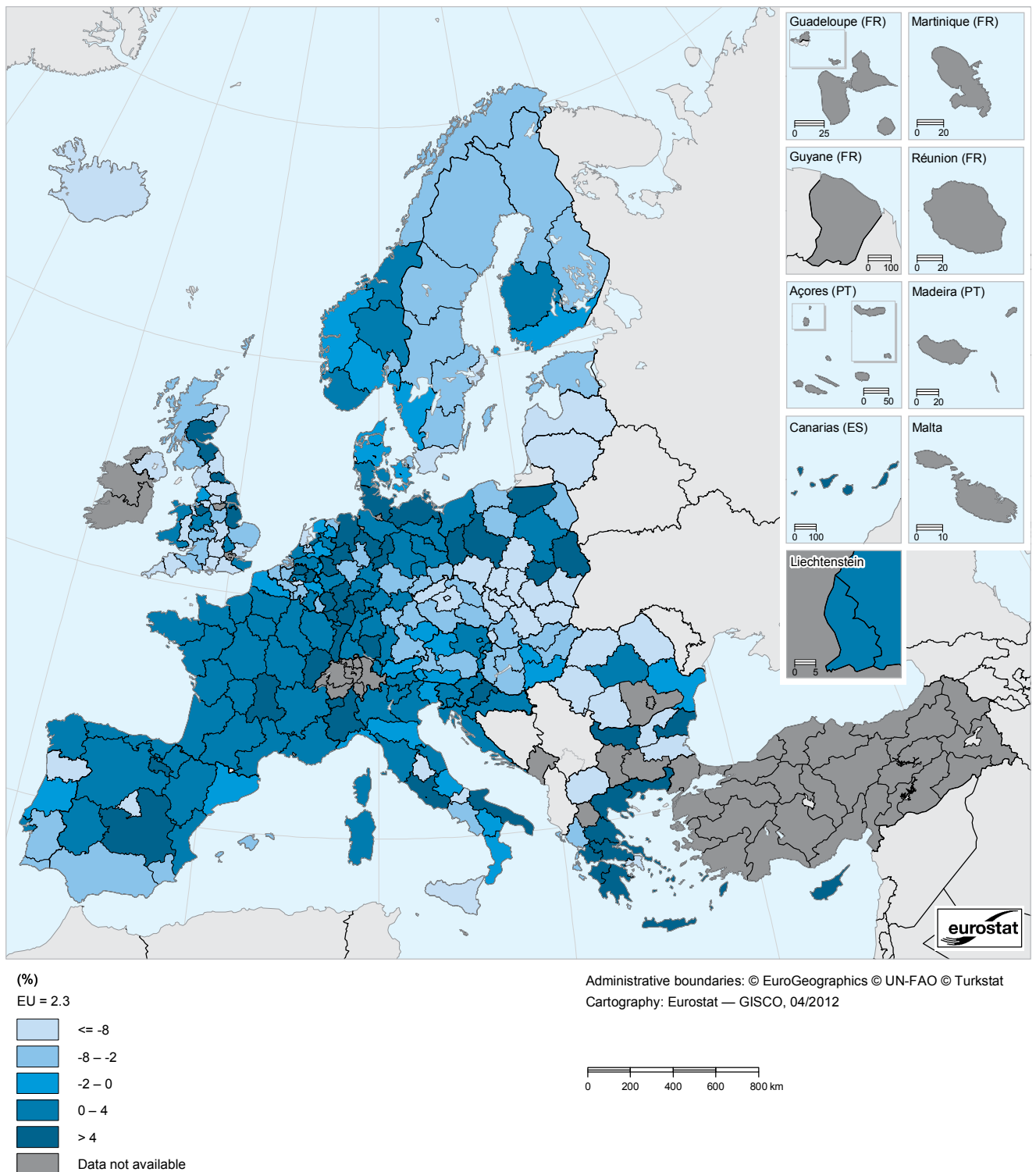
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Cartography: Eurostat — GISCO, 04/2012



⁽¹⁾ Nord-Est (ITD), Centro (ITE) and Hungary, provisional; EU-27 and Luxembourg, 2007–09; the former Yugoslav Republic of Macedonia, 2008–10; London (UKI), by NUTS 1 region.
Source: Eurostat (online data code: [tour_occ_nin2](#))



Map 7.3: Nights spent in campsites, by NUTS 2 regions, average annual change, 2007–10 ⁽¹⁾ (%)

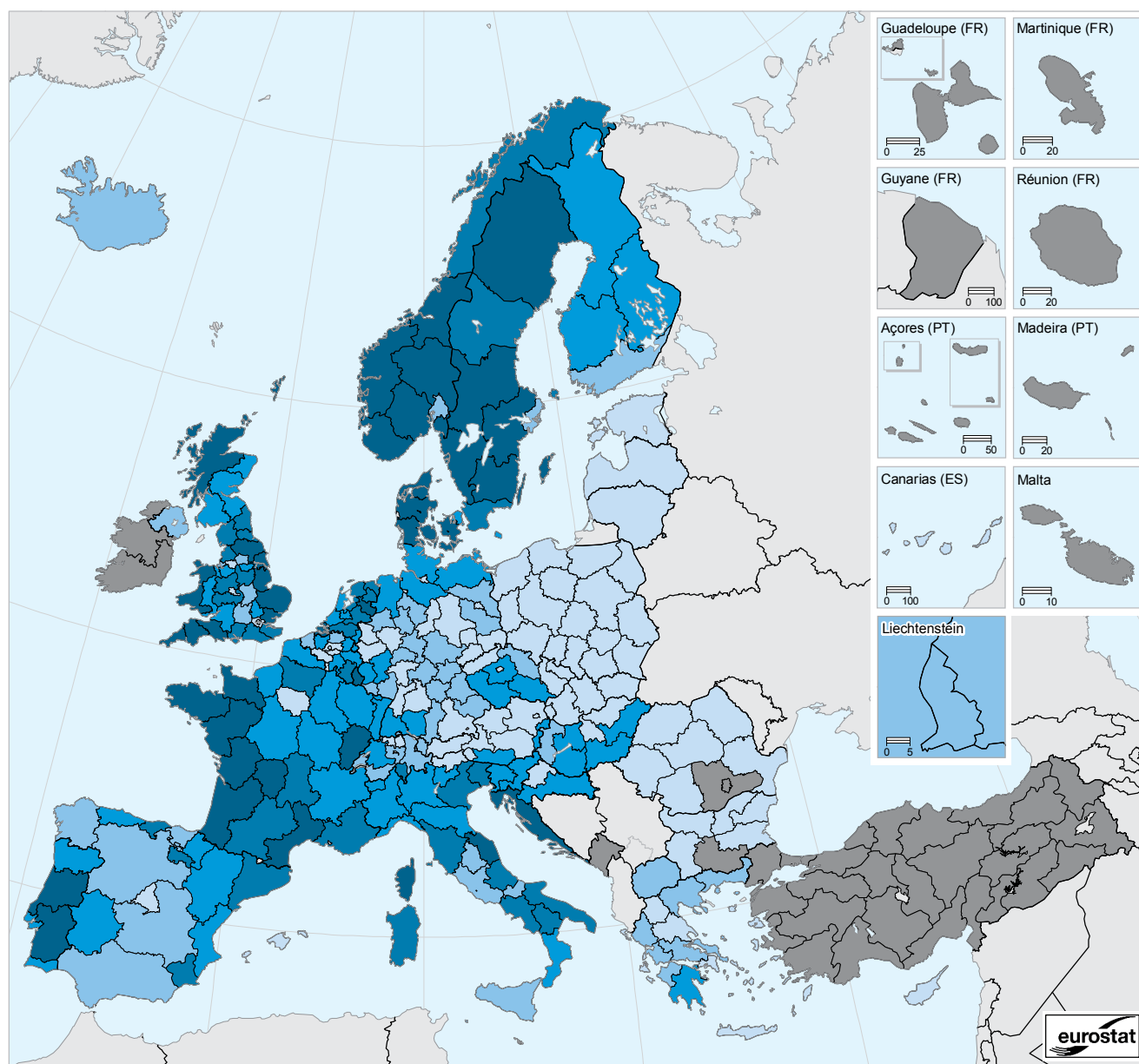


⁽¹⁾ EU (excluding Ireland and Malta), Nord-Est (ITD), Centro (ITE) and Hungary, provisional; Severozapaden (BG31) and Luxembourg, 2007–09; Freiburg (DE13), Tübingen (DE14), Düsseldorf (DEA1), Münster (DEA3), Sud-Vest Oltenia (RO41), West Yorkshire (UKE4) and the former Yugoslav Republic of Macedonia, 2008–10; London (UK1), by NUTS 1 region.

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



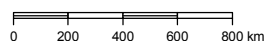
Map 7.4: Share of nights spent in campsites, by NUTS 2 regions, 2010 ⁽¹⁾
 (% of total nights spent in hotels, campsites and other collective accommodation establishments)



(% of total nights spent in hotels, campsites and other collective accommodation establishments)
 EU = 16.5

- <= 5
- 5 – 10
- 10 – 20
- 20 – 30
- > 30
- Data not available

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 Cartography: Eurostat — GISCO, 04/2012



⁽¹⁾ Nord-Est (ITD), Centro (ITE) and Hungary, provisional; EU (excluding Ireland and Malta), Severozapaden (BG31) and Luxembourg, 2009; Switzerland, nights spent in campsites as a proportion of total nights spent in hotels and campsites.
 Source: Eurostat (online data code: [tour_occ_nin2](#))



hotels, campsites and other collective accommodation establishments were concentrated in the United Kingdom (10 regions), France (nine regions), Sweden (five out of eight Swedish regions), Denmark (four out of five Danish regions), the Netherlands and Portugal (two regions each) and Italy and Luxembourg (one region each). Furthermore, five of the seven Norwegian regions reported that more than 30 % of the tourist nights spent in hotels, campsites and other collective accommodation establishments were on campsites, as was the case in one of the Croatian regions.

No regions in Bulgaria, Estonia, Latvia, Lithuania, Poland, Romania or Slovakia had a share of nights spent on campsites above 5 %. With the exception of Luxembourg (analysis based on the whole country at NUTS level 2), where the share of nights spent on campsites reached 32.8 % in 2009, the likelihood of spending the night on a campsite was generally low in capital city regions. This share exceeded 10 % (but was under 14 %) only in the capital city regions of the Netherlands, Slovenia, Denmark and Portugal, all of which are coastal regions; in 16 of the Member States the share of nights spent on campsites was under 5 % in the capital city regions.

Share of inbound tourism

For the EU-27 as a whole, non-residents accounted for 40.4 % of all overnight stays in hotels, campsites and other collective accommodation establishments in 2009. Across the regions of the EU in 2010, the share of inbound tourism (visits from abroad) differed very widely, ranging from a low of 3.1 % of the total nights spent in the Romanian region of Sud-Vest Oltenia to a high of 95.3 % of all nights spent in Malta. Foreign overnight visitors also accounted for more than 90 % of overnight stays in Luxembourg, the Greek region of Kriti, the Czech capital city region of Praha and Cyprus; this level was also exceeded in Liechtenstein and the Croatian region of Jadranska Hrvatska.

Map 7.5 shows overnight stays by foreign visitors as a percentage of total overnight stays. In total there were 48 EU regions where more than half of the overnight stays in 2010 were made by non-residents. This was often the case in capital city regions — the only exceptions being Germany, Spain, Finland, Sweden and Poland; no data are available for Ireland. Southern Europe's island and coastal regions recorded particularly high shares of overnight stays by foreign visitors, especially Malta, Cyprus, the Greek island regions, the Spanish Illes Balears and Canarias, the Spanish region of Cataluña, the Portuguese Região Autónoma da Madeira, the Portuguese region of the Algarve, the Bulgarian Black Sea coast and the Italian region of Veneto. Alpine regions in Austria and Italy also recorded a majority of their overnight stays being made by foreign visitors, as did many regions in Belgium, Greater Manchester in the United Kingdom, the Finnish island region of Åland and Severozápad in the Czech Republic (which includes the spa city of Karlovy Vary).

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

Figure 7.2 shows the top 20 EU regions recording the highest number of overnight stays by foreign (inbound) tourists in 2010. These top 20 regions accounted for more than half of all overnight stays by non-residents across the EU-27. The top six regions visited by foreign tourists (Canarias, Illes Balears, Inner London, Cataluña, Île-de-France and Veneto) collectively recorded more overnight stays than the next 14 regions put together. The list of the top 20 tourist regions visited by foreign tourists includes regions from eight different Member States: Spain, the United Kingdom, France, Italy, Austria, Greece, Cyprus and the Netherlands: five of the regions were Spanish and five were Italian. The Croatian region of Jadranska Hrvatska had 32.1 million overnight stays from non-residents, which placed it between the sixth and seventh most popular regions within the EU (by this measure).

Most popular regions

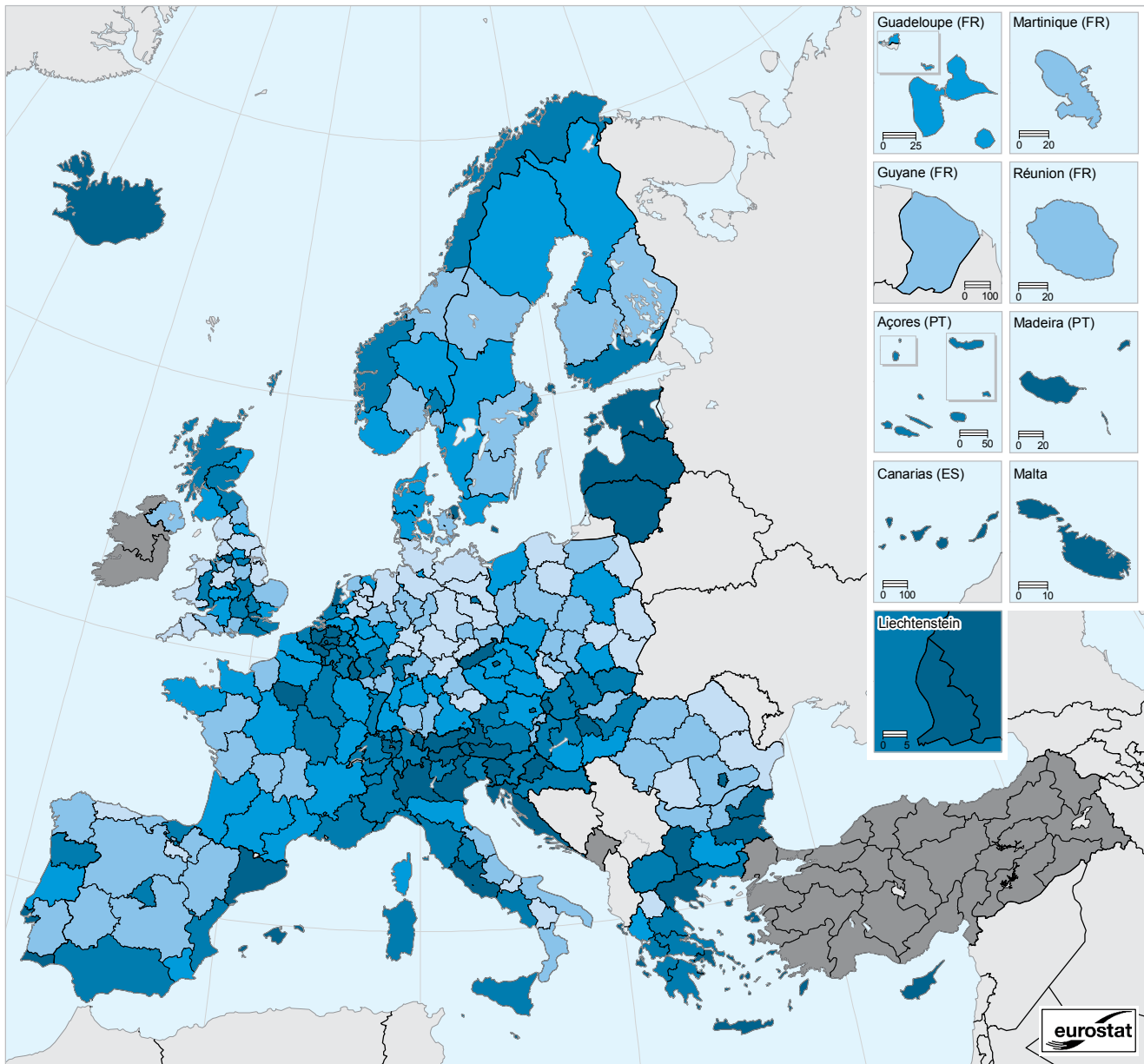
Across the whole of the EU-27 in 2009, the most popular region for residents to visit was the capital city region of France (Île de France) with almost 30 million nights spent by domestic tourists — this increased to 36 million nights in 2010. The most popular destinations for non-residents were the Spanish island regions of the Canarias and Illes Balears, where almost 61 million nights and just over 48 million nights, respectively, were spent by foreign tourists in 2009; this increased to 65 million and 51 million in 2010.

Table 7.1 shows by country, separately for residents and non-residents, which region had the most overnight stays in hotels, campsites and other collective accommodation establishments in 2010. Tourists often visit regions with a coastline and this is, by definition, the case for the nine Member States where all NUTS level 2 regions have a coastline; equally this was not the case for the five Member States that are landlocked.

Of the remaining 13 Member States (that were neither landlocked nor completely coastal) the most visited region was generally different for residents and for non-residents, the only exceptions being the Black Sea coastal region of Yugoiztochen (Bulgaria), the Île de France (which includes Paris, France) and Etelä-Suomi (which includes Helsinki, Finland). Among residents, the most popular region had a coastline in 10 of these 13 Member States, the exceptions being in France, the Netherlands and Slovenia. Among non-residents, the situation was more balanced, with the most visited region having a coastline in seven of the 13 Member States; in five of the most popular regions for non-residents that did not have a coastline the most popular region was the capital city region, the only exception being Poland where the region of Małopolskie (including the city of Kraków) was the most popular for non-residents.

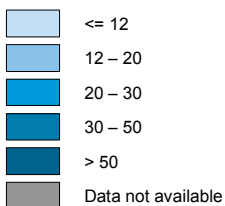


Map 7.5: Share of non-resident nights spent in hotels, campsites and other collective accommodation establishments, by NUTS 2 regions, 2010 ⁽¹⁾
 (% of total nights spent by residents and non-residents)

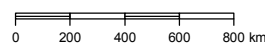


(% of total nights spent by residents and non-residents)

EU-27 = 40.4



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 Cartography: Eurostat — GISCO, 05/2012

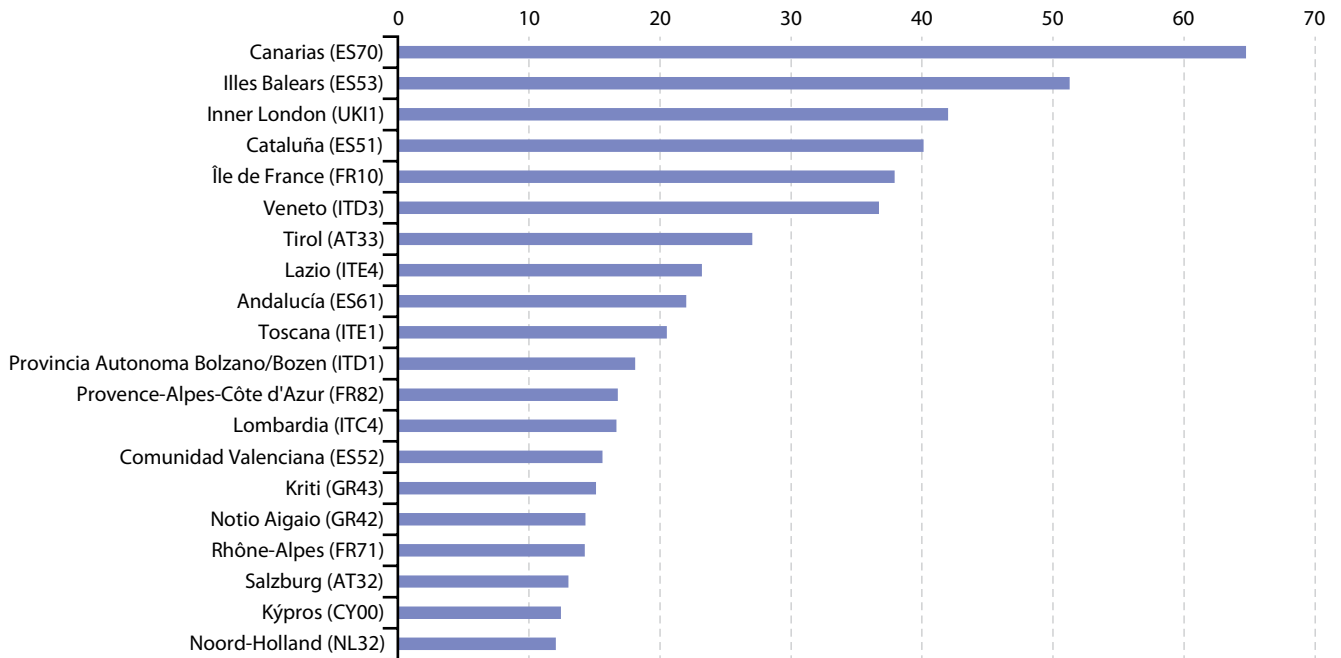


⁽¹⁾ Nord-Est (ITD), Centro (ITE) and Hungary, provisional; EU-27 and Luxembourg, 2009; Switzerland, hotels and campsites only; Ciudad Autónoma de Ceuta (ES63), Ciudad Autónoma de Melilla (ES64), Guadeloupe (FR91), Martinique (FR92), Guyane (FR93) and Réunion (FR94), hotels only; London (UKI), by NUTS 1 region.

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



Figure 7.2: Top 20 EU-27 tourist regions, number of nights spent by non-residents in hotels, campsites and other collective accommodation establishments, by NUTS 2 regions, 2010 ⁽¹⁾ (million nights)



⁽¹⁾ Nord-Est (ITD), Centro (ITE) and Hungary, provisional; Luxembourg, 2009.
Source: Eurostat (online data code: [tour_occ_nin2](#))

Among the nine Member States where all NUTS level 2 regions have a coastline, there were only four countries with more than one region. Of these, non-residents were most likely to visit the capital city regions in Denmark and Sweden, while in Portugal they were more likely to visit the Algarve; for Ireland information is not available for non-residents.

Among the four landlocked Member States with more than one region (therefore excluding Luxembourg) the most popular regions were a mixture of capital city regions (for non-residents visiting the Czech Republic or Hungary) and regions with mountains, lakes and historic towns and cities.

Tourism intensity

Map 7.6 provides a measure of tourism intensity (also called carrying capacity): it measures the number of overnight stays in relation to the resident population. This serves as an indicator of the relative importance of tourism for a region. It provides a more nuanced 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 possible tourism pressure. The average tourism intensity in the EU-27 was 4 463 overnight stays per 1 000 inhabitants in 2009.

The huge importance of tourism to many of the EU's coastal regions and, even more so, to its islands and most of the Alpine region, is clear from Map 7.6. A total of 30 EU regions recorded a tourism intensity of more than 10 000 overnight stays (in hotels, campsites or other collective tourist accommodation) per 1 000 inhabitants (data are generally available for 2010): six were in the United Kingdom (data are for 2009), five in Italy, four in Austria, three in Greece, two each in Germany, Spain, the Netherlands and Portugal, and one each in Cyprus, Finland, France (2009) and Malta. From a geographical perspective, seven of these regions were Alpine and 20 of them had a coastline; the three regions that were neither Alpine nor had a coastline were the German region of Trier, the Dutch region of Drenthe and Inner London in the United Kingdom.

The Italian Provincia Autonoma Bolzano/Bozen had the highest tourism intensity, with 56 519 overnight stays per 1 000 inhabitants in 2010, followed by the Spanish region of Illes Balears and the Greek region of Notio Aigaio, both with more than 50 000 overnight stays per 1 000 inhabitants.

Among the regions within Iceland, Liechtenstein, Norway (2009) and Switzerland, the mountainous Norwegian region of Hedmark og Oppland had the highest tourism intensity, with 11 505 overnight stays per 1 000 inhabitants; the only other mountainous region with in excess of 10 000 overnight



Table 7.1: Most popular tourist regions, number of nights spent in hotels, campsites and other collective accommodation establishments, by NUTS 2 regions, 2010 ⁽¹⁾

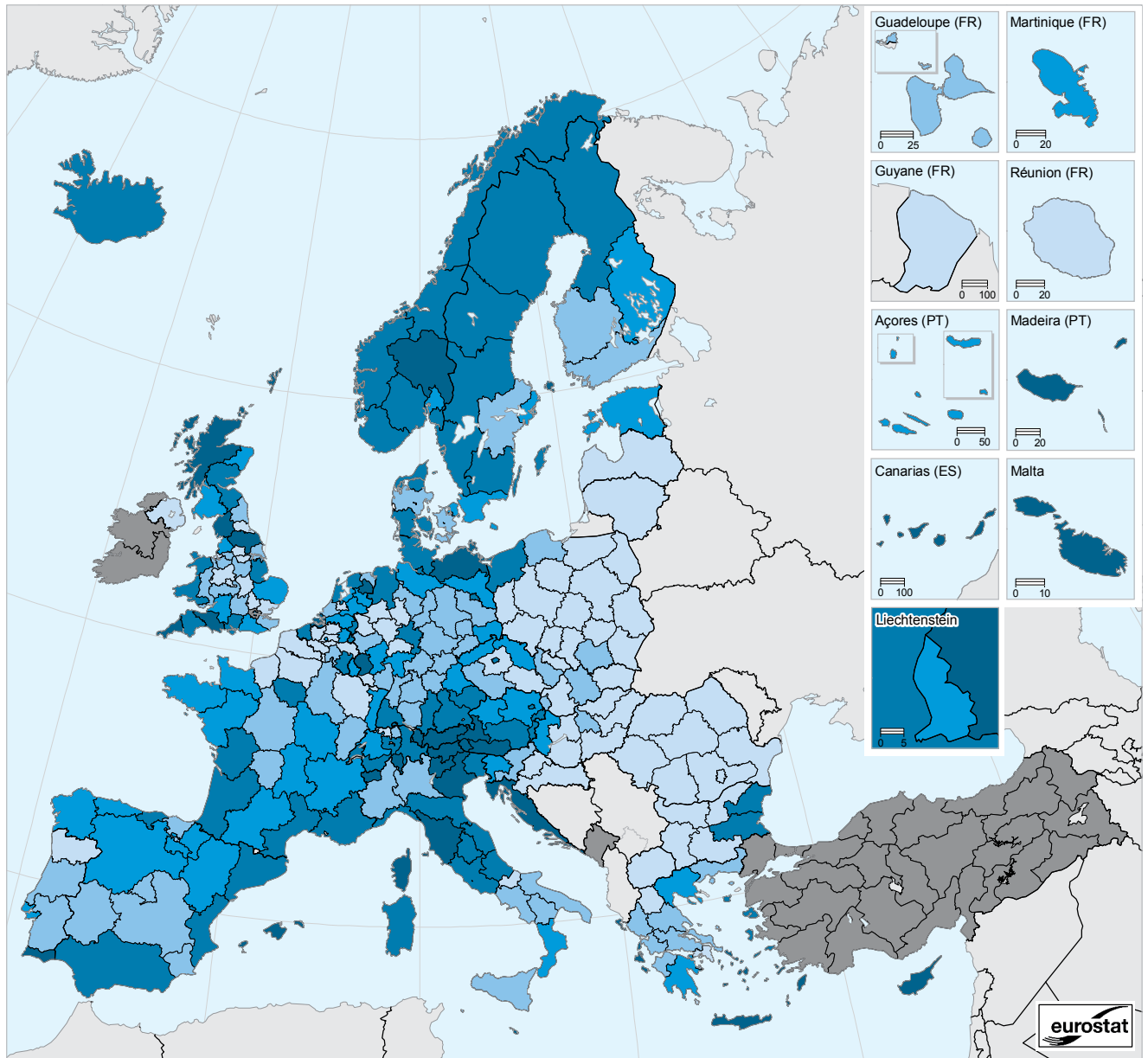
	Residents			Non-residents		
	Total nights spent in country (million nights)	Most popular region	Share of most popular region in national total (%)	Total nights spent in country (million nights)	Most popular region	Share of most popular region in national total (%)
Belgium	14.1	Province/Provincie West-Vlaanderen (BE25)	31.4	16.2	Région de Bruxelles-Capitale/Brussels Hoofdstedelijk Gewest (BE10)	27.8
Bulgaria	5.6	Yugoiztochen (BG34)	27.7	10.5	Yugoiztochen (BG34)	46.0
Czech Republic	18.5	Severovýchod (CZ05)	26.3	18.4	Praha (CZ01)	59.6
Denmark	18.2	Syddanmark (DK03)	31.7	9.0	Hovedstaden (DK01)	43.5
Germany	265.8	Mecklenburg-Vorpommern (DE80)	9.0	59.7	Berlin (DE30)	14.2
Estonia	1.5		-	3.2		-
Ireland	12.7	Southern and Eastern (IE02)	68.6	:		:
Greece	17.8	Kentriki Makedonia (GR12)	18.3	49.0	Kriti (GR43)	30.9
Spain	151.5	Andalucía (ES61)	18.9	213.3	Canarias (ES) (ES70)	30.3
France	270.8	Île de France (FR10)	13.3	120.4	Île de France (FR10)	31.5
Italy	210.3	Emilia-Romagna (ITD5)	13.6	165.2	Veneto (ITD3)	22.2
Cyprus	1.4		-	12.4		-
Latvia	0.9		-	1.9		-
Lithuania	1.2		-	1.6		-
Luxembourg	0.2		-	2.1		-
Hungary	9.7	Nyugat-Dunántúl (HU22)	24.4	9.4	Közép-Magyarország (HU10)	55.9
Malta	0.4		-	7.3		-
Netherlands	58.1	Gelderland (NL22)	14.8	26.8	Noord-Holland (NL32)	45.0
Austria	31.2	Steiermark (AT22)	19.3	66.8	Tirol (AT33)	40.5
Poland	45.7	Zachodniopomorskie (PL42)	16.3	10.1	Malopolskie (PL21)	21.2
Portugal	19.6	Algarve (PT15)	24.9	25.4	Algarve (PT15)	40.1
Romania	13.3	Sud-Est (RO22)	26.2	2.8	București - Ilfov (RO32)	38.6
Slovenia	3.7	Vzhodna Slovenija (SI01)	58.5	4.7	Zahodna Slovenija (SI02)	66.3
Slovakia	6.5	Stredné Slovensko (SK03)	37.0	3.7	Stredné Slovensko (SK03)	27.5
Finland	14.2	Etelä-Suomi (FI18)	35.7	5.0	Etelä-Suomi (FI18)	55.7
Sweden	36.7	Västsvrige (SE23)	21.2	11.2	Stockholm (SE11)	29.8
United Kingdom	149.7	West Wales and The Valleys (UKL1)	6.5	84.6	London (UKI)	49.6
Iceland	0.8		-	2.1		-
Liechtenstein	0.0		-	0.2		-
Norway	20.6	Sør-Østlandet (NO03)	20.2	7.9	Vestlandet (NO05)	24.9
Croatia	3.8	Jadranska Hrvatska (HR03)	75.8	33.2	Jadranska Hrvatska (HR03)	96.4
FYR of Macedonia	0.7		-	0.5		-

⁽¹⁾ Nord-Est (ITD), Centro (ITE) and Hungary, provisional; Ireland, estimates; Ireland and Luxembourg, 2009; London (UKI), by NUTS 1 region.

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

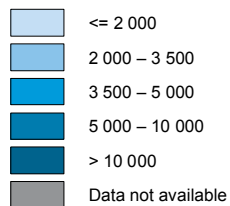


Map 7.6: Tourism intensity: nights spent in hotels, campsites and other collective tourist accommodation, by NUTS 2 regions, 2010 ⁽¹⁾
(per 1 000 inhabitants)



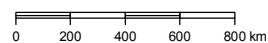
(per 1 000 inhabitants)

EU-27 = 4 463.3



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Cartography: Eurostat — GISCO, 04/2012



⁽¹⁾ Nord-Est (ITD), Centro (ITE) and Hungary, provisional; EU-27, Belgium, Chemnitz (DED1), Dresden (DED2), Leipzig (DED3), France, Luxembourg, the United Kingdom and Norway, 2009; Switzerland, hotels and campsites only; Ciudad Autónoma de Ceuta (ES63), Ciudad Autónoma de Melilla (ES64), Guadeloupe (FR91), Martinique (FR92), Guyane (FR93) and Réunion (FR94), hotels only.

Source: Eurostat (online data codes: [tour_occ_nin2](#) and [demo_r_d3avg](#))



stays per 1000 inhabitants was Ticino (Switzerland). The Croatian coastal region of Jadranska Hrvatska recorded 23784 overnight stays per 1000 inhabitants, which was a slightly higher intensity than the 13th ranked region within the EU.

In contrast, at the other end of the ranking there were 71 regions with 2000 or fewer overnight stays per 1000 inhabitants, of which 22 had 1000 or fewer overnight stays per 1000 inhabitants. Most of the latter were located in Poland (8 regions), Romania (6 regions), Bulgaria (3 regions) or Belgium (2 regions, 2009). Apart from Jadranska Hrvatska, the remaining two Croatian regions as well as the former Yugoslav Republic of Macedonia also recorded a level of intensity below 1000 overnight stays per 1000 inhabitants.

Average length of stay

Map 7.7 shows the average length of stay in hotels, campsites and other collective tourist accommodation in 2010. The total number of nights spent in a region is influenced by the number of visitors and their average length of stay. The importance of each of these 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 tourists staying for private reasons also tend to opt for relatively short stays. In contrast, the average length of stays was substantially longer in typical holiday regions visited chiefly for recreational purposes. Note that the data presented refer to the average duration of stay at a particular establishment and as such does not necessarily reflect the duration of stay in a particular region, as it is possible that tourists move from one establishment to another, staying at different hotels or campsites within the same region when they are touring around a specific area.

There were 56 NUTS level 2 regions within the EU that reported an average length of stay in hotels, campsites and other collective tourist accommodation of more than 3.5 nights in 2010. The highest figures were recorded in Spanish and Greek holiday destinations, with the top five regions including the Canarias (7.5 nights), Kriti (6.7 nights), the Illes Balears (6.6 nights) and Notio Aigaio and Ionia Nisia (both 6.3 nights).

The highest average numbers of nights spent in campsites were observed mainly in coastal regions, while for hotels the longest average stays were mainly in island regions. Overall, visitors tended to stay longer in campsites than in hotels: for the EU-27 as a whole the average length of stay in campsites was 4.9 nights in 2010 (excluding Ireland, Luxembourg and Malta) compared with 2.5 nights for hotels (excluding Ireland and Luxembourg).

Accommodation capacity

In the EU-27 there were more than 200 000 hotels and in excess of 27 000 tourist campsites in 2010; together these provided 12.5 million bed places in hotels and around 9.4 million places on tourist campsites; a further 5.6 million bed places (2009 data) were available in other collective accommodation establishments, including tourism dwellings.

Eight NUTS level 3 regions within the EU offer more than 100 000 bed places in hotels: three in Spain (Mallorca, Barcelona and Madrid), three in Italy (Bolzano/Bozen, Rimini and Roma), one in France (Paris) and one in Greece (Dodekanisos). Map 7.8 gives an overview of the number of bed places in hotels in 2010. Regions with a high number of bed places in hotels are, unsurprisingly, often the same regions that recorded a high number of overnight stays. They were mainly concentrated around coastal, mountainous and lake regions as well as in regions with capital and other major cities.

Nine out of the top 20 EU regions (NUTS level 3) ranked according to their accommodation capacity in 2010 were in France, while five each were in Spain and Italy and one in the United Kingdom. Figure 7.3 shows these top 20 regions with an analysis by type of accommodation. With the exceptions of Paris, and to a lesser extent Savoie, the French regions in this list offered mainly accommodation on campsites, while the Italian regions had a higher share of their capacity located in hotels (with the exception of Venezia). The Spanish regions were more diverse, with hotels dominating accommodation capacity on Mallorca, campsites providing more than half of the accommodation capacity in Girona (Costa Brava) and other collective accommodation (for example, tourist dwellings available for rent) reaching close to 40% in Alicante/Alacant.

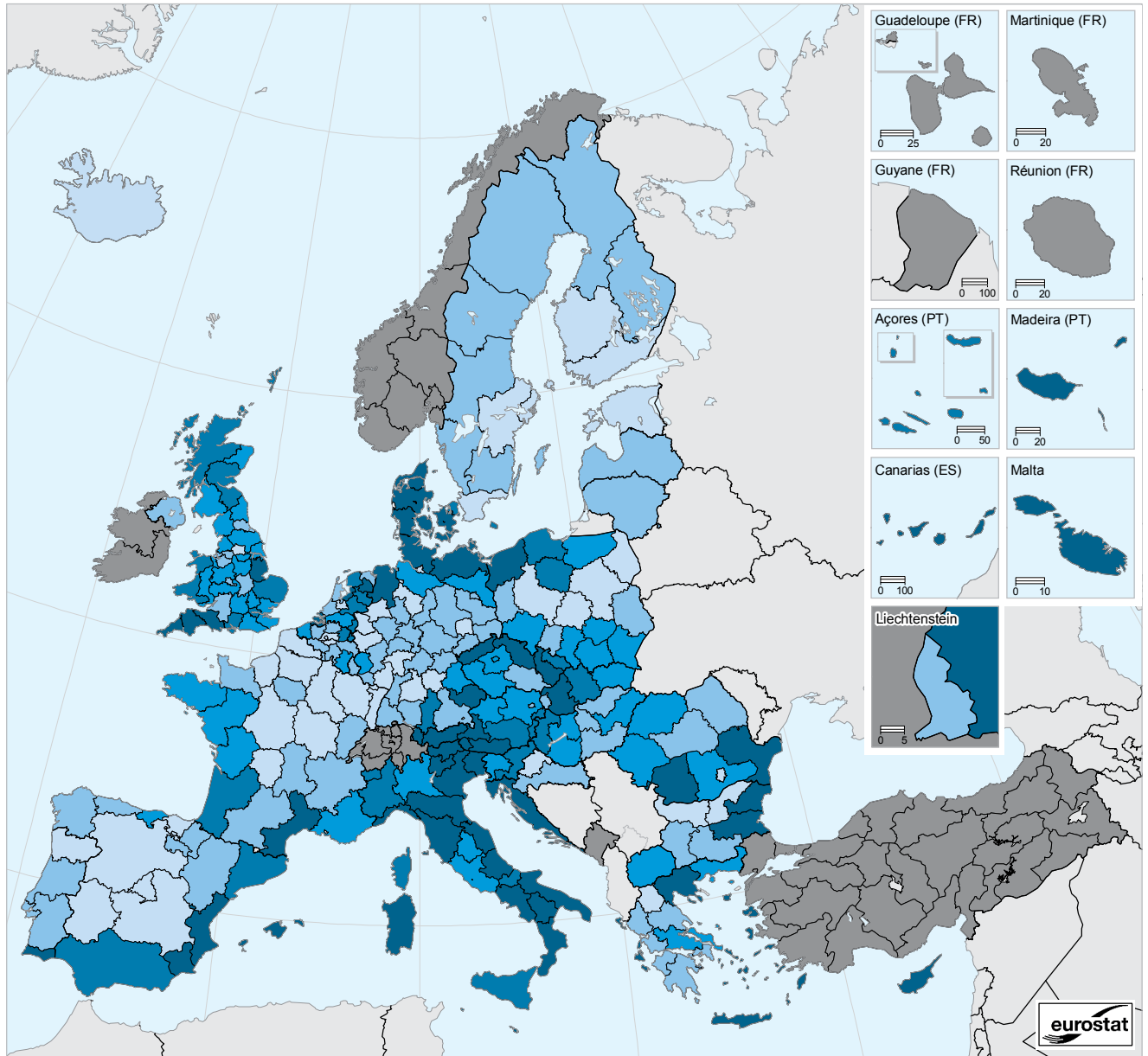
Data sources and availability

Harmonised statistical data on tourism have been collected since 1996 in the EU Member States 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, for example through data on available accommodation capacity (establishments, rooms and bed places) and its occupancy (number of visitor arrivals and overnight stays), and the demand side, such as the travel behaviour of the population. Regional results are available only for the supply side.

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.



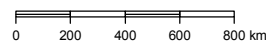
Map 7.7: Average length of stay in hotels, campsites and other collective tourist accommodation, by NUTS 2 regions, 2010 ⁽¹⁾ (days)



(days)

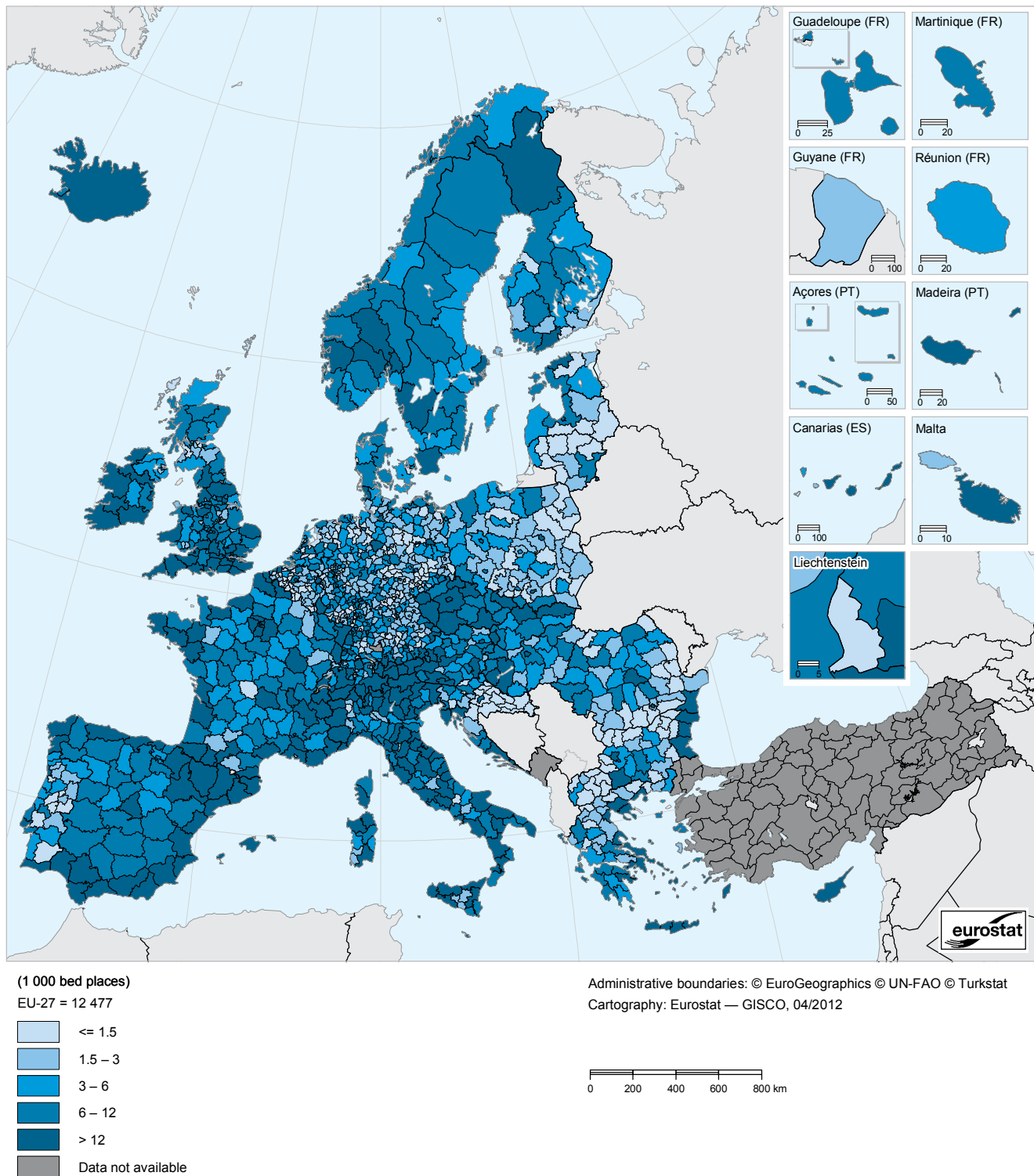


Administrative boundaries: © EuroGeographics © UN-FAO © Turkstat
Cartography: Eurostat — GISCO, 05/2012



⁽¹⁾ Nord-Est (ITD), Centro (ITE) and Hungary, provisional; France, Luxembourg and Northern Ireland (UKN0), 2009; London (UKI), by NUTS 1 region.
Source: Eurostat (online data codes: [tour_occ_nin2](#) and [tour_occ_arn2](#))

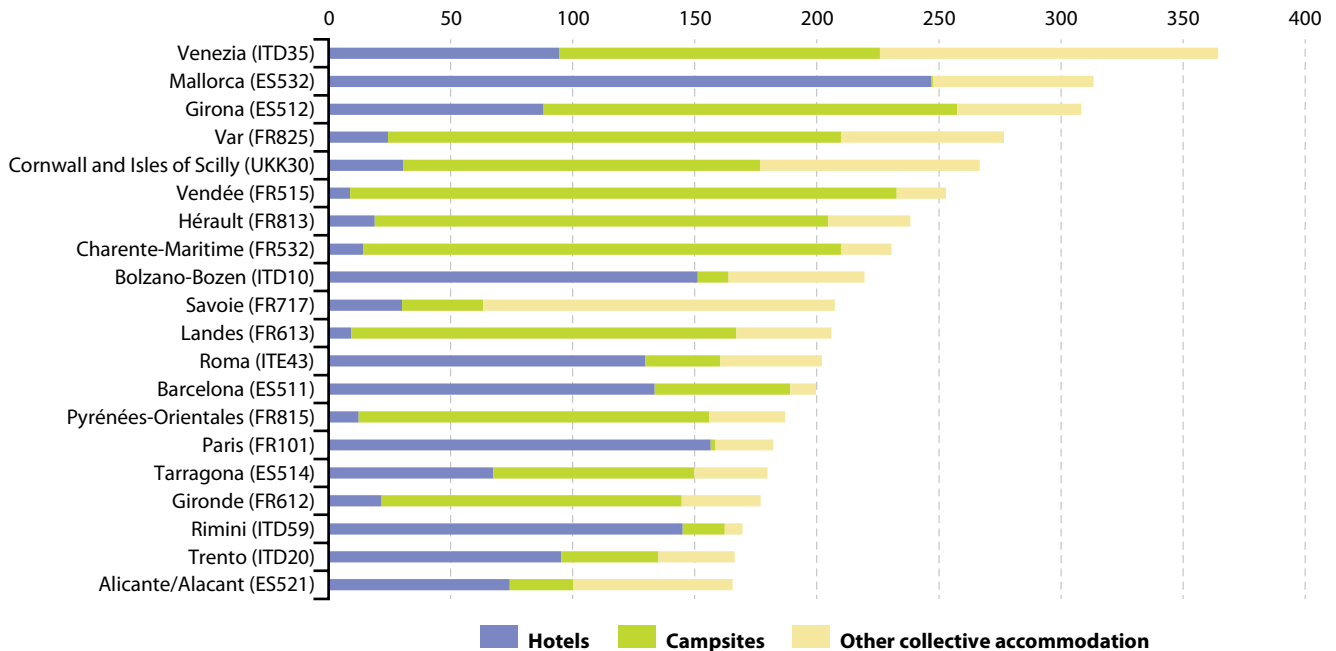
Map 7.8: Number of bed places in hotels, by NUTS 3 regions, 2010
(1 000 bed places)



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



Figure 7.3: EU-27 top 20 regions by accommodation capacity, number of bed places, by NUTS 3 regions, 2010 ⁽¹⁾
(1 000 bed places)



⁽¹⁾ Based on available information, data for some regions are missing or only available for a previous reference period; France, 2009.
Source: Eurostat (online data code: [tour_cap_nuts3](http://ec.europa.eu/eurostat/tgm/table.do?code=tour_cap_nuts3))

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.

Previous editions of this publication focused on hotels and campsites; recent improvements in data availability have made it possible to extend the coverage in this year's publication so as to include other collective accommodation establishments too.

Further information

For further information about tourism statistics please consult Eurostat's website at <http://epp.eurostat.ec.europa.eu/portal/page/portal/tourism/introduction>.

Context

The ongoing enlargement process within the EU has enriched tourism potential by the increased cultural diversity. Tourism is particularly significant in remote regions which

are far from the economic centres of their country, where tourism-related services are often a prominent factor in securing employment and are one of the main sources of income for the local population. This applies especially to Europe's island states and regions, to many coastal regions (see also Chapter 13), particularly in southern Europe, and to the whole of the Alpine region.

Tourism is an important activity with social, cultural and environmental implications, involving large numbers of small and medium-sized enterprises. Its contribution to growth and employment varies widely from one region of the EU to another.

Tourism cuts across many activities: services to tourists include hotels and other accommodation, gastronomy (for example, restaurants or cafés), transport operators and a wide range of cultural and recreational facilities (for example, theatres, museums, leisure parks or swimming pools). In many regions geared to tourism, retail and other services sectors also benefit considerably from the additional demand generated by tourists.

Inbound tourism 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 domestic visitors during their trips and thus generate greater demand in the host economy. This



expenditure also contributes to the balance of payments of the country visited, and so impacts on the trade deficit or surplus.

Tourism policy

The role that tourism plays in generating growth and jobs and its impact on other policy areas ranging from regional policy, diversification of rural economies, maritime policy, sustainability and competitiveness to social policy and inclusion (tourism for all) are widely acknowledged. Tourism is reflected in national and EU policies: the Lisbon Treaty acknowledged the importance of tourism, outlining a specific competence for the EU in this field. The communication 'Europe, the world's No 1 tourist destination — a new political framework for tourism in Europe' (COM(2010) 352) was adopted in June 2010. Through this, the European Commission encouraged a coordinated approach for

initiatives linked to tourism and defined a new framework for action to increase the competitiveness of tourism and its capacity for sustainable growth. It proposed a number of European or multinational initiatives — including a consolidation of the socioeconomic knowledge base for tourism. Globalisation of tourism opens up new opportunities, with tourists from new markets able to afford high-value vacations. The European Commission works together with the Member States and other tourism stakeholders on projects such as the European tourist destinations portal and European destinations of excellence (EDEN) in order to improve the visibility and sustainability of tourism. Another initiative concerns promoting tourism at times of the year that are traditionally regarded as the low season. This pilot initiative, called the 50 000 tourists initiative, aims to make use of spare capacity in transport networks and tourist infrastructure.