

Tourism

7





This chapter presents regional patterns of **tourism** in the **European Union (EU)**; 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; when compared with the resident population it is often referred to as tourism intensity. The chapter provides details of domestic tourism (which comprises the activities of residents of a given country travelling to and staying in places only within their own country, but outside their usual environment) — detailing the number of nights spent and preferences for different types of tourist accommodation establishments — and contrasts this with similar information on foreign tourists (who are often referred to as non-residents).

Main statistical findings

According to the **United Nations World Tourism Organisation**, Europe is the most frequently visited region in the world, accounting for over half of all international tourist arrivals worldwide in 2011. In 2011, 5 of the top 10 countries for international visitors in the world were EU Member States (France, Spain, Italy, the United Kingdom and Germany), while a sixth country in the top 10, Turkey, is an EU **candidate country**. The wealth of European cultures, the variety of its landscapes and the 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

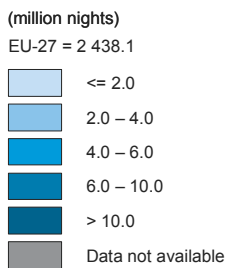
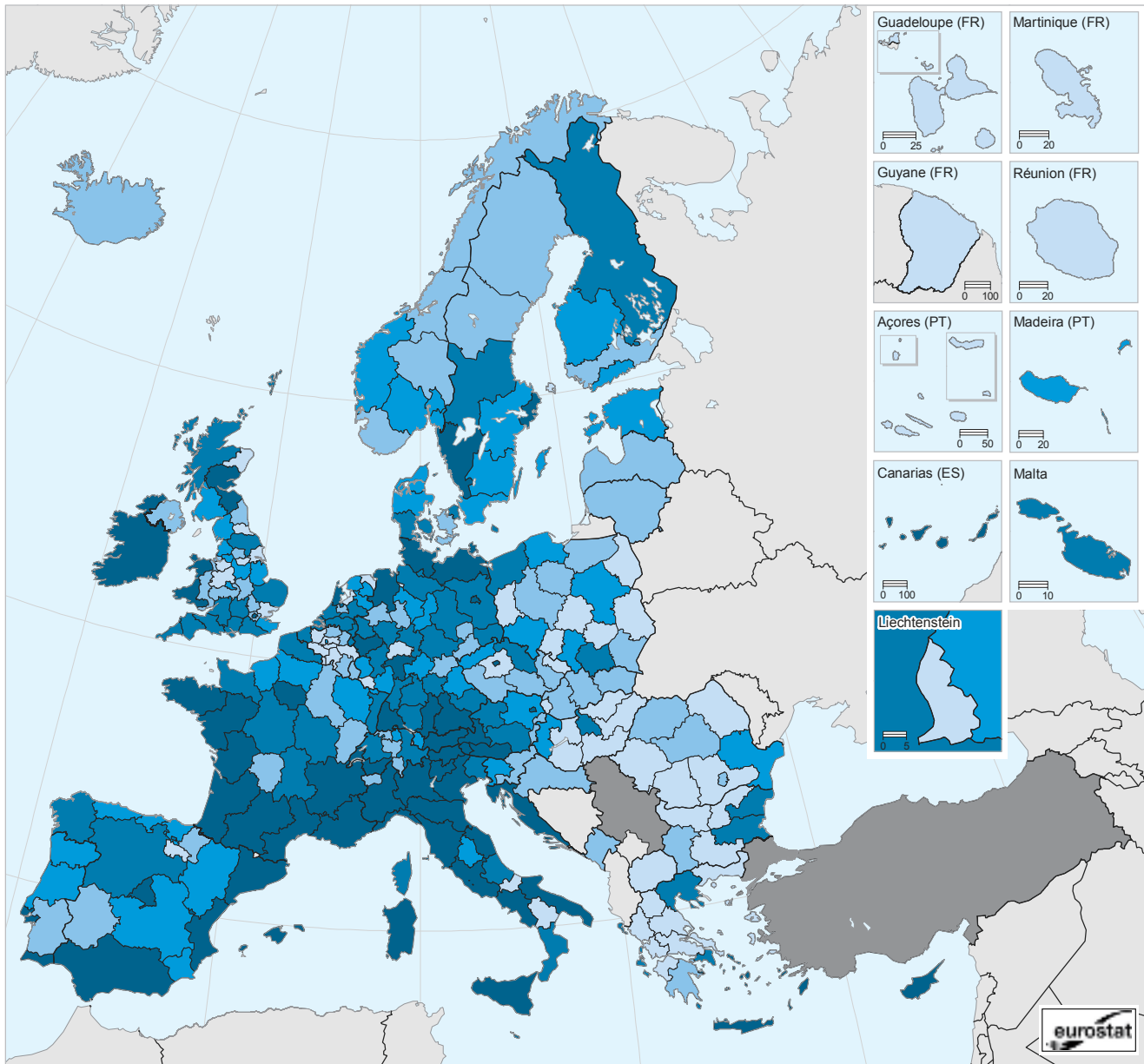
There were 2.44 billion nights spent in hotels, campsites and other collective accommodation establishments (the latter includes tourist dwellings) across the **EU-27** in 2011, of which 57.3% were by domestic tourists in their own country of residence.

Map 7.1 gives an overview of the number of overnight stays by residents and non-residents (combined) in 2011. Tourism in the EU is often concentrated in coastal regions, although the Alpine regions and some cities also experience high demand. A total of 55 regions (including Ireland for which no regional analysis is available) in the EU-27 recorded more than 10.0 million nights spent in hotels, campsites and other collective accommodation establishments, among which 20 regions recorded more than 24.0 million nights. This top 20 list included six regions in Italy, five each in Spain and France, two in Germany and one each in 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 the analysis showing a breakdown between the different types of accommodation. These 20 regions together accounted for 38.6% of all overnight stays in the 269 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 in 2011, 89.8 million and 77.2 million respectively. They were followed by the Spanish regions of Cataluña — which includes Barcelona, the Costa Brava and Costa Dorada (69.3 million) — and the Illes Balears — which includes the main island destinations of Mallorca, Menorca, Eivissa (Ibiza) and Formentera (64.3 million). The fifth largest was the Italian region of Veneto which includes Venice (63.4 million). Almost one in seven tourism nights spent in the EU were spent in one of these five regions. Inner London in the United Kingdom (eighth place), Tirol in Austria (14th place) and the German regions of Oberbayern (18th place) and Mecklenburg-Vorpommern (20th place) were the only regions in the top 20 regions for nights spent in hotels, campsites and other collective accommodation establishments that were not in one of the EU's three leading Member States for tourism (Spain, France and Italy). Jadranska Hrvatska (Croatia) recorded 37.1 million overnight stays in 2011, 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, hotels and similar establishments accounted for more than half of the nights spent in collective accommodation establishments. The regions with the largest number of overnight stays in hotels in 2011 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 Île de France (88.3%). 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, Provence-Alpes-Côte d'Azur, Aquitaine and the Pays de la Loire (the latter was not one of the top 20 regions overall), as well as Veneto in Italy and Cataluña in Spain, all with more than 10 million overnight stays on campsites; note that Jadranska Hrvatska also recorded more than 10 million overnight stays on campsites. The top two tourist regions for other collective accommodation establishments (in terms of nights spent) were the Canarias and Rhône-Alpes (France), both with more than 20 million overnight stays in other collective accommodation, with Provence-Alpes-Côte d'Azur just below this level.

Map 7.1: Nights spent in hotels, campsites and other collective accommodation establishments, by NUTS 2 regions, 2011 ⁽¹⁾
(million nights)



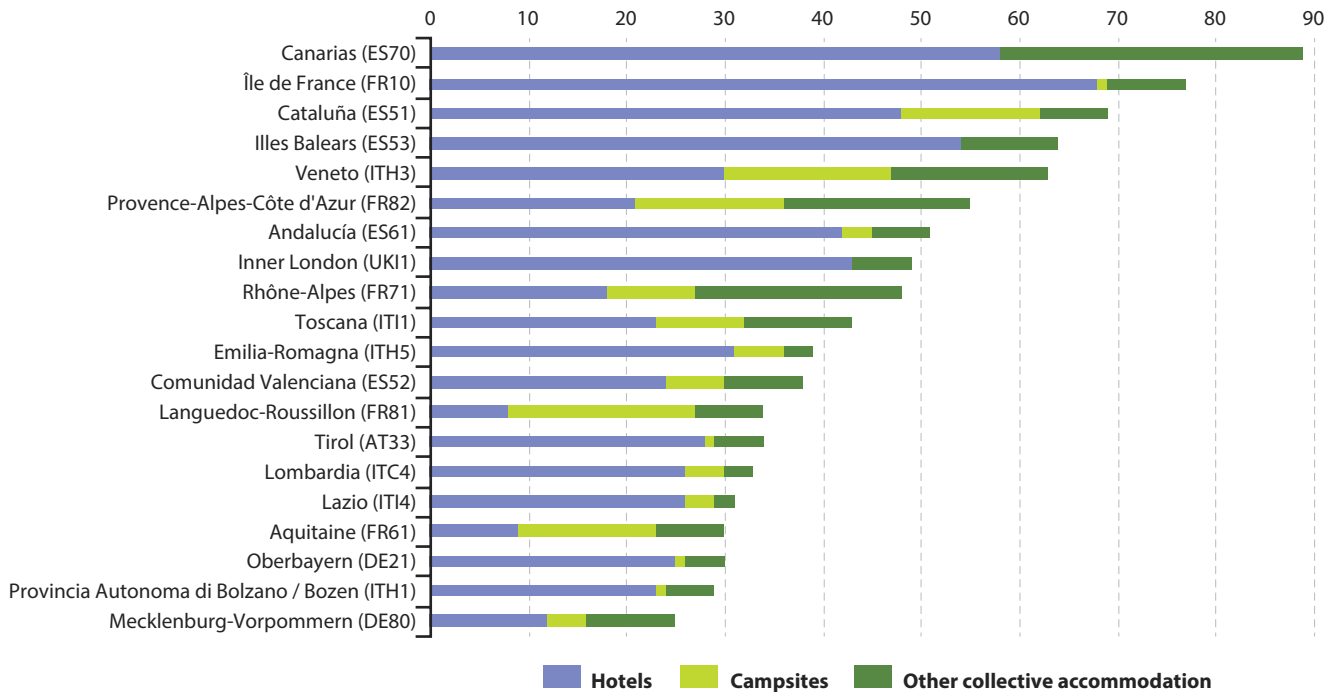
Administrative boundaries: © EuroGeographics © UN-FAO © Turkstat
Cartography: Eurostat — GISCO, 05/2013



⁽¹⁾ Greece, Sud-Vest Oltenia (RO41) and Outer London (UK12), 2010; 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, 2011 ⁽¹⁾ (million nights)



⁽¹⁾ Greece and Tees Valley and Durham (UKC1), 2010; Luxembourg, 2009; Ireland, Ciudad Autónoma de Ceuta (ES63), Ciudad Autónoma de Melilla (ES64), Départements d'outre-mer (FR9), Malta, Região Autónoma dos Açores (PT20), Região Autónoma da Madeira (PT30), Macrorregião de três (RO3), Sud-Vest Oltenia (RO41) and Outer London (UKI2), not available.
Source: Eurostat (online data code: [tour_occ_nin2](#))

Recent trends in hotel tourism

Maps 7.2 and 7.3 contrast the developments in terms of overnight stays in hotels that were experienced during the initial period of the financial and economic crisis (from the pre-crisis position in 2007 to the deepest point of the crisis in 2009) with the later stages (from 2009 to the latest available data).

The average fall in the number of overnight stays in hotels in the EU-27 between 2007 and 2009 was - 2.2% per year. The number of nights spent in hotels fell in 171 (of the 258 regions with data available), with average reductions of 3.0% or more per year in 96 regions and losses of 10.0% or more in 12 regions. By contrast, 20 regions recorded increases above 4.0% per year, with five regions — Flevoland in the Netherlands and four British regions — recording annual increases above 10.0%. It can be noted that many (but not all) British regions saw a strong increase in their level of hotel tourism between 2007 and 2009, which in many cases fell back by 2011. In nearly all of the regions with the largest rises between 2007 and 2009, the change was dominated by increases in the nights spent in hotels by residents, possibly reflecting a substitution of trips abroad by trips within the country of residence. The reverse situation, namely a strong fall during the initial phase of the crisis followed by a considerable rebound/

recovery thereafter was observed in Latvia and the Bulgarian Black Sea region of Severoiztochen. The Latvian situation reflected a fall and subsequent recovery in international tourism (overnight stays in hotels by non-residents), whereas the initial fall in Severoiztochen was mainly due to fewer overnight stays in hotels by residents, while the increase between 2009 and 2011 was driven by strong growth in the number of overnight stays by residents and non-residents alike.

The average rise for overnights stays in hotels in the EU-27 between 2009 and 2011 was an increase of 4.0% per year. There were 112 NUTS level 2 regions in the EU that recorded an annual average increase in excess of 4.0% for the number of nights spent in hotels between 2009 and 2011, among which 19 recorded average growth above 10.0% per year: at the top of the range, Lithuania (a single region at NUTS level 2) recorded an average growth of 16.8%. Eight of the regions with average growth above 10.0% were in Poland, three in Spain, two each in Belgium, Bulgaria and the United Kingdom, and one each in Estonia, Latvia, Lithuania, Romania and Slovakia. By contrast, the number of nights spent in hotels fell in 57 regions (of the 266 regions with data available), with average reductions of 3.0% or more per year in 36 regions and losses of 10.0% or more in 13 regions. Nearly all of the regions with large falls were in the United Kingdom, with one in Hungary (Dél-Dunántúl). Among the regions in

the EFTA countries, the largest falls were – 4.6 % per year in Ticino (Switzerland) and – 4.3 % per year in the Norwegian region of Hedmark og Oppland. None of the regions in EFTA countries recorded annual average growth above 10.0 %, with Iceland (8.4 % per year) and Nord-Norge (Norway, 7.5 %) recording the fastest growth. Among the three regions in acceding and candidate countries, the fastest increase was 10.8 % per year in the former Yugoslav Republic of Macedonia, while the smallest rise per year in the number of overnight stays was 1.6 % in Kontinentalna Hrvatska (Croatia).

Recent trends in camping tourism

Map 7.4 shows that the number of nights spent on campsites in the EU-27 during the period 2009–11 fell, on average, by 1.9 % per year. This average rate for the EU-27 was substantially lower than the equivalent rate of change for hotels, implying a substitution of nights spent on campsites for nights spent in hotels which may have been a rebalancing after the opposite trend was apparent during the onset of the financial and economic crisis. Furthermore, a more varied regional development could be seen for campsites, with a much wider range in the rates of change between 2009 and 2011. The number of nights spent on campsites fell by an average of 10.0 % or more per year in 54 of the 252 regions for which data are available; among these there were reductions of 20.0 % or more per year in 21 regions, with the largest decline recorded for the British region of South Yorkshire (– 82.9 %, 2010–11). The regions where the number of nights spent in campsites fell by 20.0 % or more per year were spread across 10 EU Member States, but included several regions in Poland, Slovakia and the United Kingdom. By contrast, 53 regions recorded an annual average increase in excess of 4.0 %, among which 23 regions posted growth averaging more than 10.0 % per year. The fastest average growth was recorded in Bulgaria, with 648.4 % (2010–11) in the region of Severoiztochen; this high growth rate was recorded from a very low initial number of nights spent on campsites. Six of the regions with average growth above 10.0 % were in the United Kingdom (mixed years of data availability), three each in Bulgaria and Greece (2009–10), two each in Germany, Italy (mixed years of data availability) and Poland, and one each in Belgium, Spain, Cyprus, Latvia and the Netherlands.

Nearly all regions in EFTA countries recorded a decline in overnight stays in campsites between 2009 and 2011, falling by as much as 32.9 % per year in Iceland. The only regions that did not see a fall in overnight stays were in Norway: 1.7 % growth in Oslo og Akershus and no change in Sør-Østlandet. The two acceding and candidate countries with data available saw mixed fortunes, the former Yugoslav Republic of Macedonia recording a 11.8 % per year average fall in overnight stays in campsites, whereas both Croatian regions recorded growth, 3.7 % for Jadranska Hrvatska and 5.1 % for Kontinentalna Hrvatska.

Share of inbound tourism

For the EU-27 as a whole, non-residents accounted for 43 % of all overnight stays in hotels, campsites and other collective accommodation establishments in 2011. Across the regions of the EU, the share of inbound tourism (visits from abroad) differed very widely in 2011: this share ranged from a low of 3 % of the total nights spent in the Romanian region of Sud-Vest Oltenia and the German region of Mecklenburg-Vorpommern to a high of 96 % of all nights spent in Malta. Foreign overnight visitors also accounted for more than 90 % of overnight stays in the Greek regions of Kriti and Notio Aigaio, Cyprus, Luxembourg, the Czech capital city region of Praha and the Austrian Alpine region of Tirol; this level was also exceeded in the Croatian region of Jadranska Hrvatska.

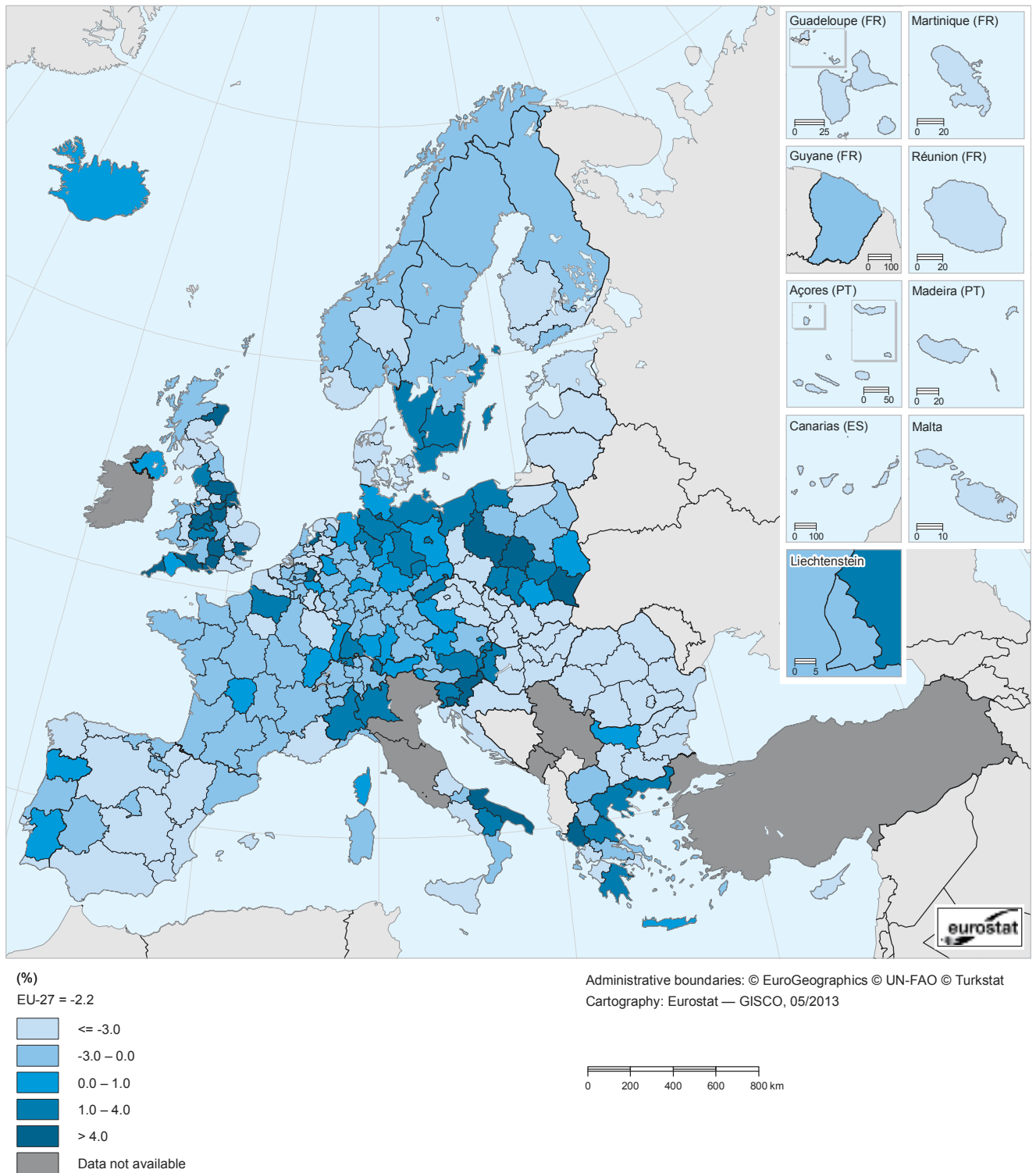
Map 7.5 shows overnight stays by foreign visitors as a percentage of total overnight stays. In total there were 50 EU regions where more than half of the overnight stays in 2011 were made by non-residents. This was often the case in capital city regions — the only exceptions being Germany, Spain (where the share was exactly 50 %), Poland, Finland and Sweden; no regional data are available for Ireland. Southern Europe's island and coastal regions recorded particularly high shares of overnight stays by foreign visitors (more than 50 %), especially Malta, Cyprus, the Greek island regions, the Spanish Illes Balears and Canarias, the Spanish region of Cataluña, the Portuguese Região Autónoma da Madeira and the Região Autónoma dos Açores, the Portuguese region of the Algarve, the Bulgarian Black Sea coast and the Italian regions of Veneto and Toscana. Alpine regions in Austria and Italy also recorded a majority of their overnight stays being made by foreign visitors, as did the Finnish island region of Åland, Severozápad in the Czech Republic (which includes the spa city of Karlovy Vary) and many regions in Belgium.

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

Figure 7.2 shows the 20 EU regions recording the highest number of overnight stays by foreign (inbound) tourists in 2011. These top 20 regions accounted for more than half (53 %) of all overnight stays by non-residents across the EU-27. The top six regions visited by foreign tourists (Canarias, Illes Balears, Cataluña, Inner London, 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 in eight different EU 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 34.1 million overnight stays from non-residents, which placed it between the sixth and seventh most popular regions within the EU (by this measure).



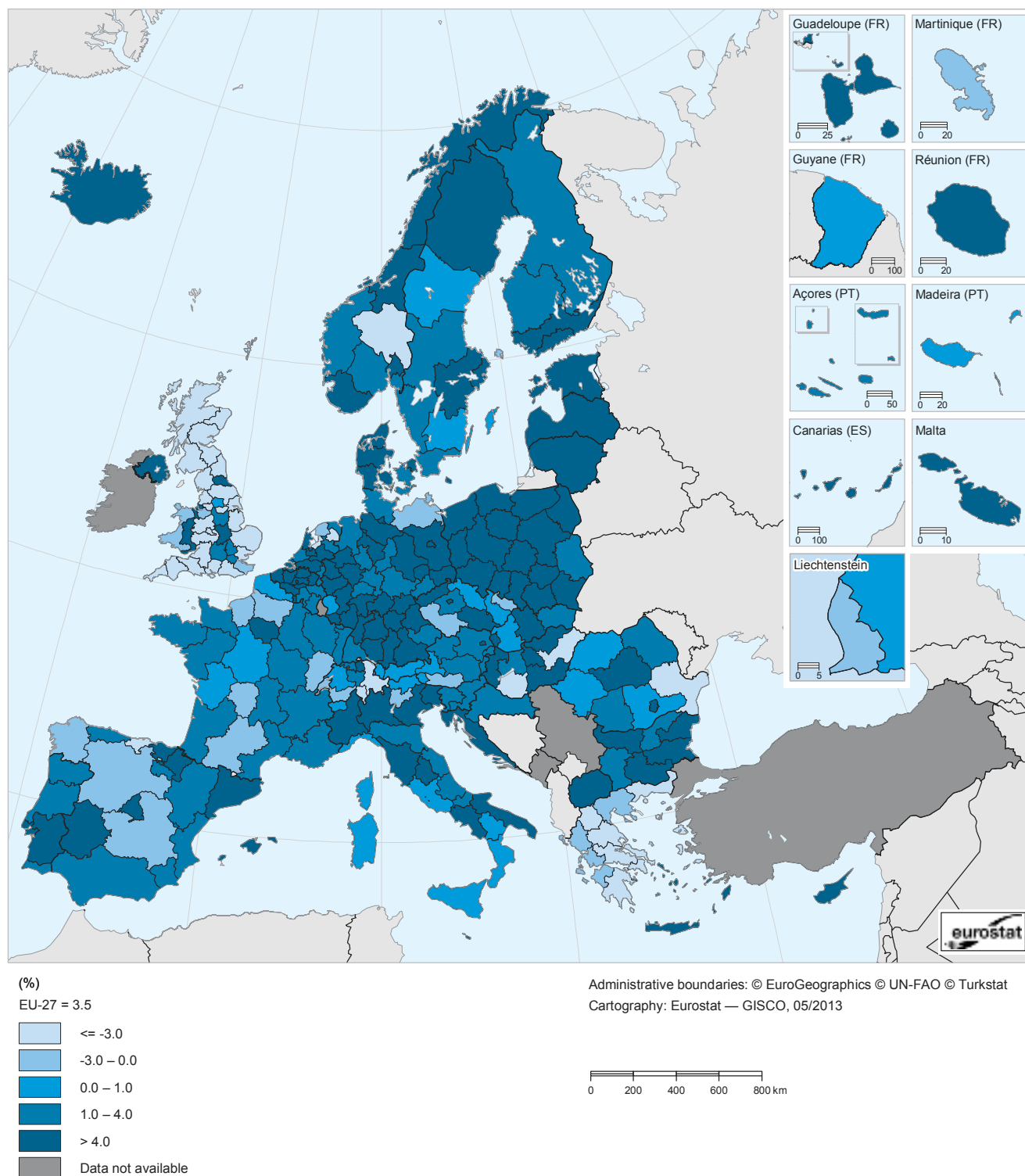
Map 7.2: Nights spent in hotels, by NUTS 2 regions, average annual change, 2007–09 ⁽¹⁾
(%)



(1) The former Yugoslav Republic of Macedonia, 2008–09; London (UK), by NUTS 1 region.

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

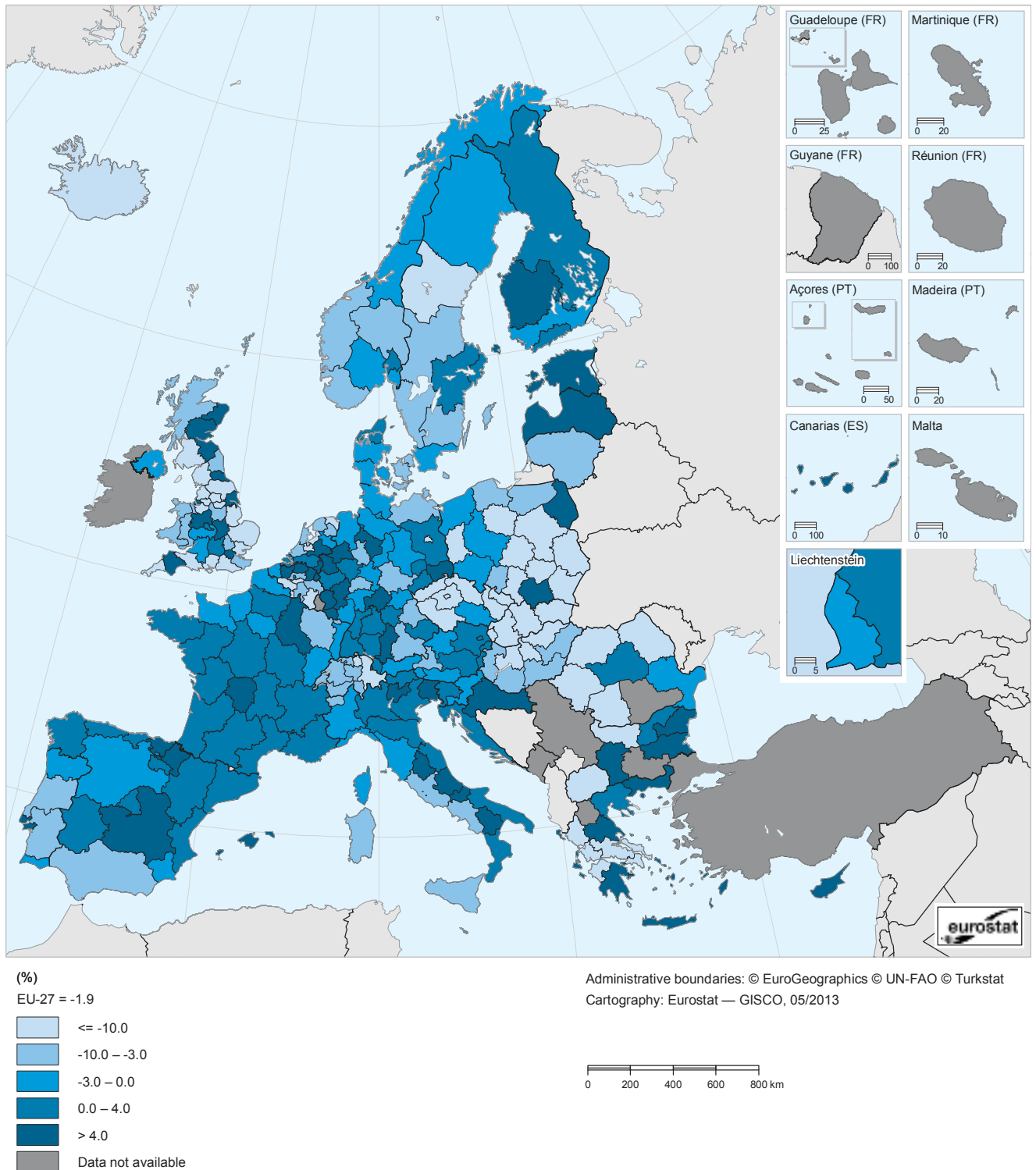
Map 7.3: Nights spent in hotels, by NUTS 2 regions, average annual change, 2009–11 ⁽¹⁾
(%)



⁽¹⁾ Nord-Est (ITH) and Centro (ITI), 2010–11; Greece, 2009–10; London (UKI), by NUTS 1 region.
Source: Eurostat (online data code: [tour_occ_nin2](#))



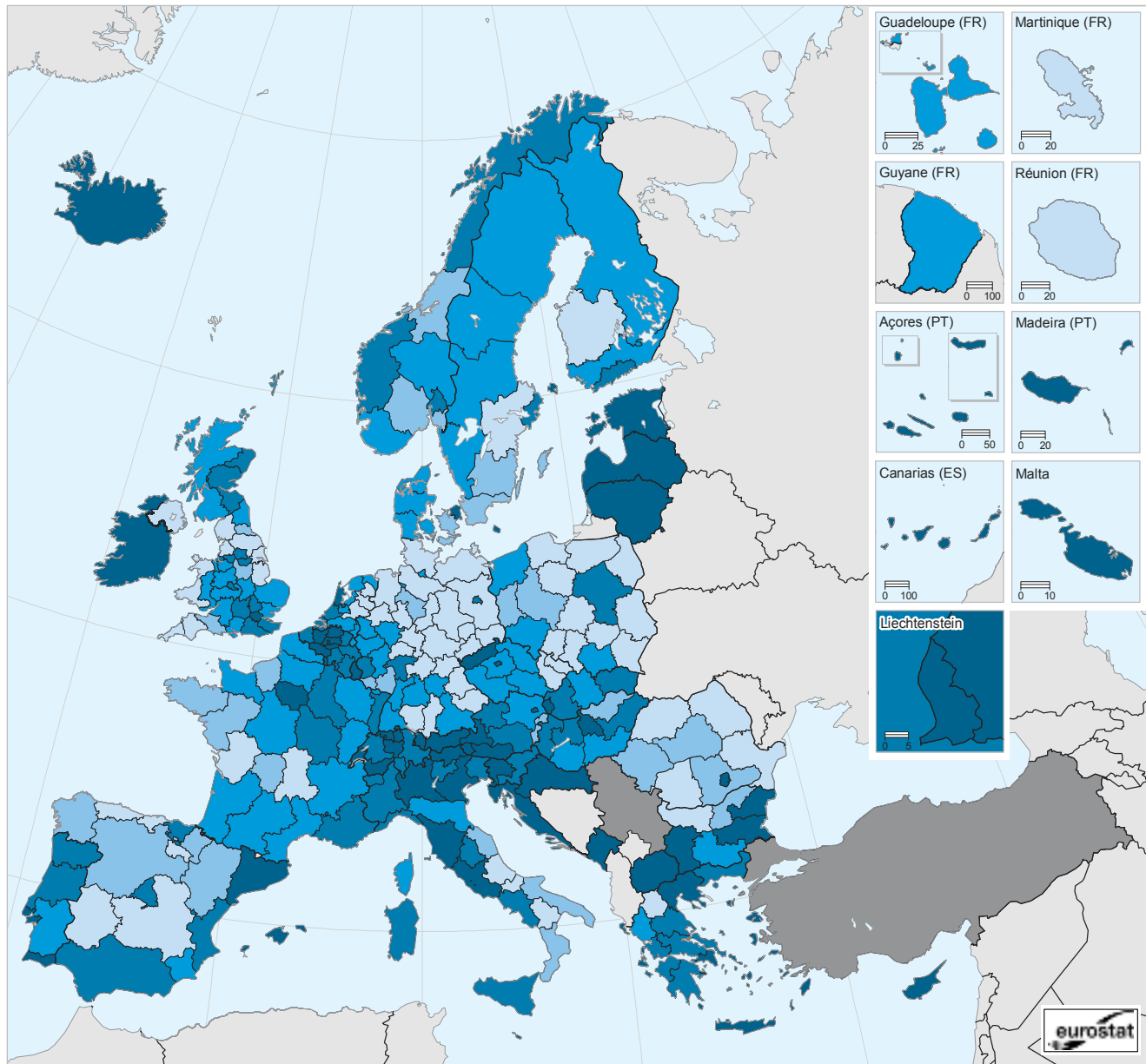
Map 7.4: Nights spent in campsites, by NUTS 2 regions, average annual change, 2009–11 ⁽¹⁾ (%)



⁽¹⁾ EU-27 excluding Ireland, Greece, Luxembourg and Malta; Région de Bruxelles-Capitale/Brussels Hoofdstedelijk Gewest (BE10), Severoiztochen (BG33), Nord-Est (ITH) and Centro (ITI) and South Yorkshire (UKE3), 2010–11; Greece, Sud-Vest Oltenia (RO41) and Tees Valley and Durham (UKC1), 2009–10; London (UKI), by NUTS 1 region.

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

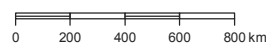
Map 7.5: Share of non-resident nights spent in hotels, campsites and other collective accommodation establishments, by NUTS 2 regions, 2011 ⁽¹⁾
 (% of total nights spent by residents and non-residents)



(% of total nights spent by residents and non-residents)
 EU-27 = 43



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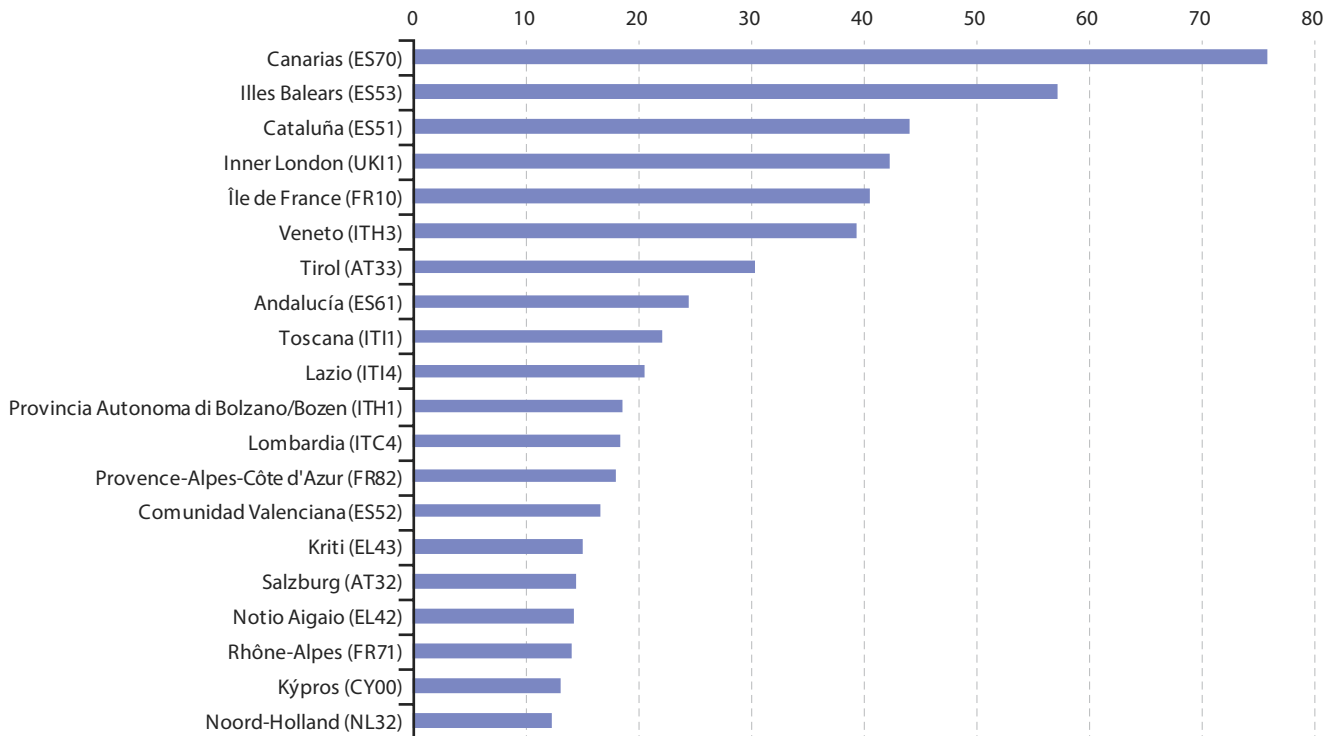


⁽¹⁾ Greece, Sud-Vest Oltenia (RO41), 2010; Luxembourg, 2009; Ireland, 2006; Switzerland, hotels and campsites only; Ciudad Autónoma de Ceuta (ES63), Ciudad Autónoma de Melilla (ES64), Guadeloupe (FR91), Martinique (FR92), Guyane (FR93) and Réunion (FR94), hotels only; London (UKI), by NUTS 1 region; Ireland, national level.

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, 2011 ⁽¹⁾ (million nights)



⁽¹⁾ Greece, Sud-Vest Oltenia (RO41) and Outer London (UKI2), 2010; Luxembourg, 2009; Ireland, Ciudad Autónoma de Ceuta (ES63), Ciudad Autónoma de Melilla (ES64) and Départements d'outre-mer (FR9), not available.

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

Most popular regions

Across the whole of the EU-27 in 2011, the most popular region for residents (in this case French residents) to visit was the Mediterranean region of Provence-Alpes-Côte d'Azur with 37.3 million nights spent by domestic tourists. The most popular destinations for non-residents (foreign tourists) were the Spanish island regions of the Canarias and Illes Balears and the Spanish mainland region of Cataluña, where 76.0 million nights, 57.2 million nights and 44.0 million nights respectively, were spent by foreign tourists in 2011.

Table 7.1 shows by country, separately for residents and non-residents, which region had the most number of overnight stays in hotels, campsites and other collective accommodation establishments in 2011. Tourists often visit regions with a coastline and this is, by definition, the case for the 10 EU 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 12 EU 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 Yu-goiztochen (Bulgaria) and the north-western coastal region of Zachodniopomorskie (Poland). Among residents, the most popular region had a coastline in 10 of the 12 remaining Member States, the exceptions being in the Netherlands and Slovenia. Among non-residents, the situation was more balanced, with the most visited region having a coastline in seven of the 12 Member States; all five of the most popular regions for non-residents that did not have a coastline were capital city regions.

Among the 10 EU Member States where all NUTS level 2 regions have a coastline, there were only five countries with more than one region. Of these, non-residents were most likely to visit the capital city regions in Denmark, Finland 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 EU 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.

Table 7.1: Most popular tourist regions, number of nights spent in hotels, campsites and other collective accommodation establishments, by NUTS 2 regions, 2011 ⁽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 (%)
Countries where all regions are coastal						
Denmark	19	Syddanmark (DK03)	31	9	Hovedstaden (DK01)	46
Estonia	2		-	4		-
Ireland	13	Southern and Eastern (IE02)	74	:		:
Cyprus	1		-	13		-
Latvia	1		-	2		-
Lithuania	1		-	2		-
Malta	0		-	7		-
Portugal	19	Algarve (PT15)	25	28	Algarve (PT15)	40
Finland	14	Pohjois- ja Itä-Suomi (FI1D)	37	6	Helsinki-Uusimaa (FI1B)	43
Sweden	37	Västsverige (SE23)	21	11	Stockholm (SE11)	30
Iceland	1		-	2		-
Montenegro	0		-	3		-
Countries with coastal and non-coastal regions						
Belgium	15	Province/Provincie West-Vlaanderen (BE25)	31	17	Région de Bruxelles-Capitale/Brussels Hoofdstedelijk Gewest (BE10)	29
Bulgaria	6	Yugoiztochen (BG34)	27	12	Yugoiztochen (BG34)	45
Germany	276	Mecklenburg-Vorpommern (DE80)	9	63	Berlin (DE30)	15
Greece	18	Kentriki Makedonia (GR12)	18	49	Kriti (GR43)	31
Spain	150	Andalucía (ES61)	18	239	Canarias (ES70)	32
France	277	Provence-Alpes-Côte d'Azur (FR82)	13	123	Île de France (FR10)	33
Italy	210	Emilia-Romagna (IT15)	14	176	Veneto (IT13)	22
Netherlands	58	Gelderland (NL22)	15	28	Noord-Holland (NL32)	45
Poland	47	Zachodniopomorskie (PL42)	17	11	Zachodniopomorskie (PL42)	21
Romania	15	Sud-Est (RO22)	25	3	Bucureşti - Ilfov (RO32)	38
Slovenia	4	Vzhodna Slovenija (SI01)	59	5	Zahodna Slovenija (SI02)	67
United Kingdom	143	West Wales and The Valleys (UKL1)	7	88	Inner London (UKI1)	48
Norway	21	Sør-Østlandet (NO03)	20	8	Vestlandet (NO05)	25
Croatia	4	Jadranska Hrvatska (HR03)	76	35	Jadranska Hrvatska (HR03)	96
Landlocked countries						
Czech Republic	19	Severovýchod (CZ05)	26	19	Praha (CZ01)	60
Luxembourg	0		-	2		-
Hungary	10	Nyugat-Dunántúl (HU22)	24	9	Közép-Magyarország (HU10)	62
Austria	32	Steiermark (AT22)	19	74	Tirol (AT33)	41
Slovakia	6	Stredné Slovensko (SK03)	38	4	Stredné Slovensko (SK03)	27
Liechtenstein	0		-	0		-
Switzerland	17	Ostschweiz (CH05)	25	21	Région lémanique (CH01)	29
FYR of Macedonia	1		-	1		-

⁽¹⁾ Greece, 2010; Sud-Vest Oltenia (RO41) and Outer London (UKI2), 2010 for non-residents; Luxembourg, 2009; Switzerland, hotels and campsites only.

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



Tourism intensity

Map 7.6 provides a measure of **tourism intensity**: it measures the number of overnight stays (not including overnight stays in non-rented accommodation) 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 4 847 overnight stays per thousand inhabitants in 2011. The Spanish region of Illes Balears had the highest tourism intensity, with 58 889 overnight stays per thousand inhabitants in 2011, followed by the Italian Provincia Autonoma di Bolzano/Bozen and the Greek region of Notio Aigaio, both with more than 50 000 overnight stays per thousand inhabitants.

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 57 EU regions recorded a tourism intensity of more than 7 000 overnight stays (in hotels, campsites or other collective tourist accommodation) per thousand inhabitants (data are generally available for 2011): nine were in Italy, seven were in the United Kingdom, six each in France and Austria, five each in Spain and the Netherlands, four each in Germany and Greece (data for 2010), two each in Portugal and Sweden, and one each in Belgium, the Czech Republic, Denmark, Ireland (2006, national level data only), Cyprus, Malta and Finland. From a geographical perspective, 12 of these regions were Alpine, 40 of them (including Ireland) had a coastline and among these three were Alpine and had a coastline: Provence-Alpes-Côte d'Azur in France as well as Veneto and Friuli-Venezia Giulia in Italy. The eight regions that were neither Alpine nor had a coastline were the Province/Provincie Luxembourg (Belgium), the Czech capital city region of Praha, the German regions of Trier and Niederbayern, the Dutch regions of Drenthe and Limburg as well as Inner London in the United Kingdom.

By contrast, at the other end of the ranking there were 67 regions with 2 000 or fewer overnight stays per thousand inhabitants, of which 20 had 1 000 or fewer overnight stays per thousand inhabitants. The latter were located in Poland (eight regions), Romania (six regions), Bulgaria and the United Kingdom (two regions each), and Belgium and Hungary (one region each).

Among the regions within Iceland, Liechtenstein, Norway and Switzerland (hotels and campsites only), the mountainous Norwegian region of Hedmark og Oppland had the highest tourism intensity, with 10 405 overnight stays per thousand inhabitants; the only other EFTA regions with more than 7 000 overnight stays per thousand inhabitants were Iceland (one level 2 region) and the mountainous region of

Ticino (Switzerland). The lowest tourism intensity among the EFTA regions was in Nordwestschweiz (Switzerland), with 1 939 overnight stays per thousand inhabitants.

Among acceding and candidate countries the Croatian coastal region of Jadranska Hrvatska recorded 25 244 overnight stays per thousand inhabitants, which was a slightly higher tourism intensity than the 12th ranked region within the EU. The remaining Croatian region as well as the former Yugoslav Republic of Macedonia recorded a level of intensity below 1 000 overnight stays per thousand inhabitants while in Montenegro the intensity was 5 109 nights per thousand inhabitants.

Average length of stay

Map 7.7 shows the **average length of stay** in hotels, campsites and other collective tourist accommodation in 2011. 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. By contrast, the average length of stays was substantially longer in typical holiday regions visited chiefly for recreational purposes. Note that the data presented refers 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.

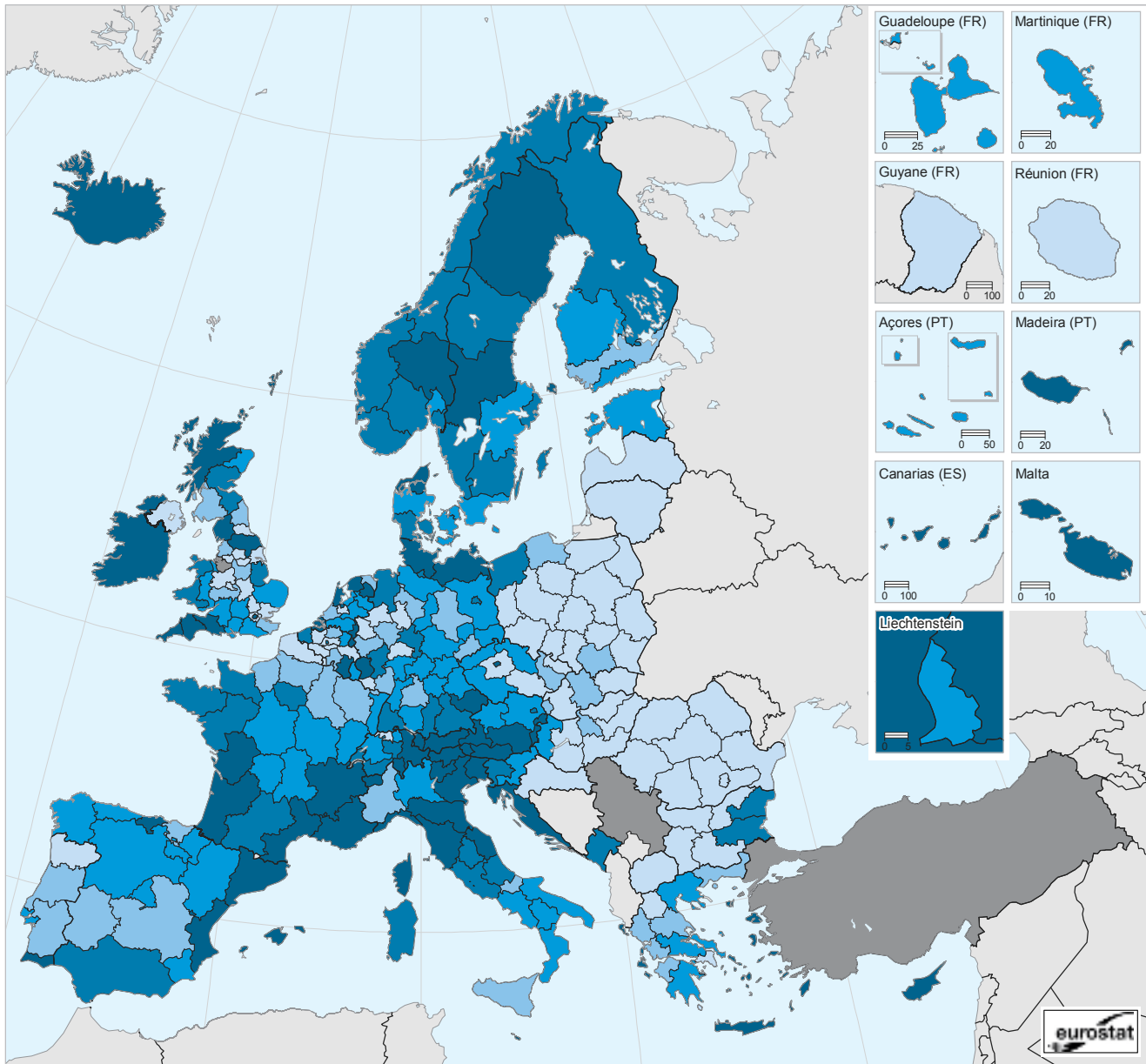
There were 18 NUTS level 2 regions within the EU that reported an average length of stay in hotels, campsites and other collective tourist accommodation of more than 5.0 nights in 2011. The highest figures were recorded in Spanish and Greek holiday destinations: the top five regions including the Canarias (7.7 nights), Kriti (6.7) and the Illes Balears (6.5 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 2011 (excluding Ireland, Greece, Luxembourg and Malta) compared with 2.5 nights for hotels.

Accommodation capacity

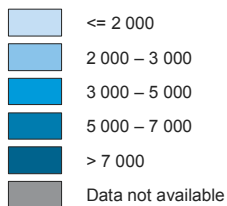
In the EU-27 there were 202 000 hotels and around 27 000 tourist campsites in 2011; these provided 12.6 million bed places in hotels and around 9.5 million places on tourist campsites; a further 5.9 million bed places were available

Map 7.6: Tourism intensity: nights spent in hotels, campsites and other collective tourist accommodation, by NUTS 2 regions, 2011 ⁽¹⁾ (per thousand inhabitants)

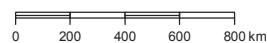


(per thousand inhabitants)

EU-27 = 4 847



Administrative boundaries: © EuroGeographics © UN-FAO © Turkstat
Cartography: Eurostat — GISCO, 05/2013

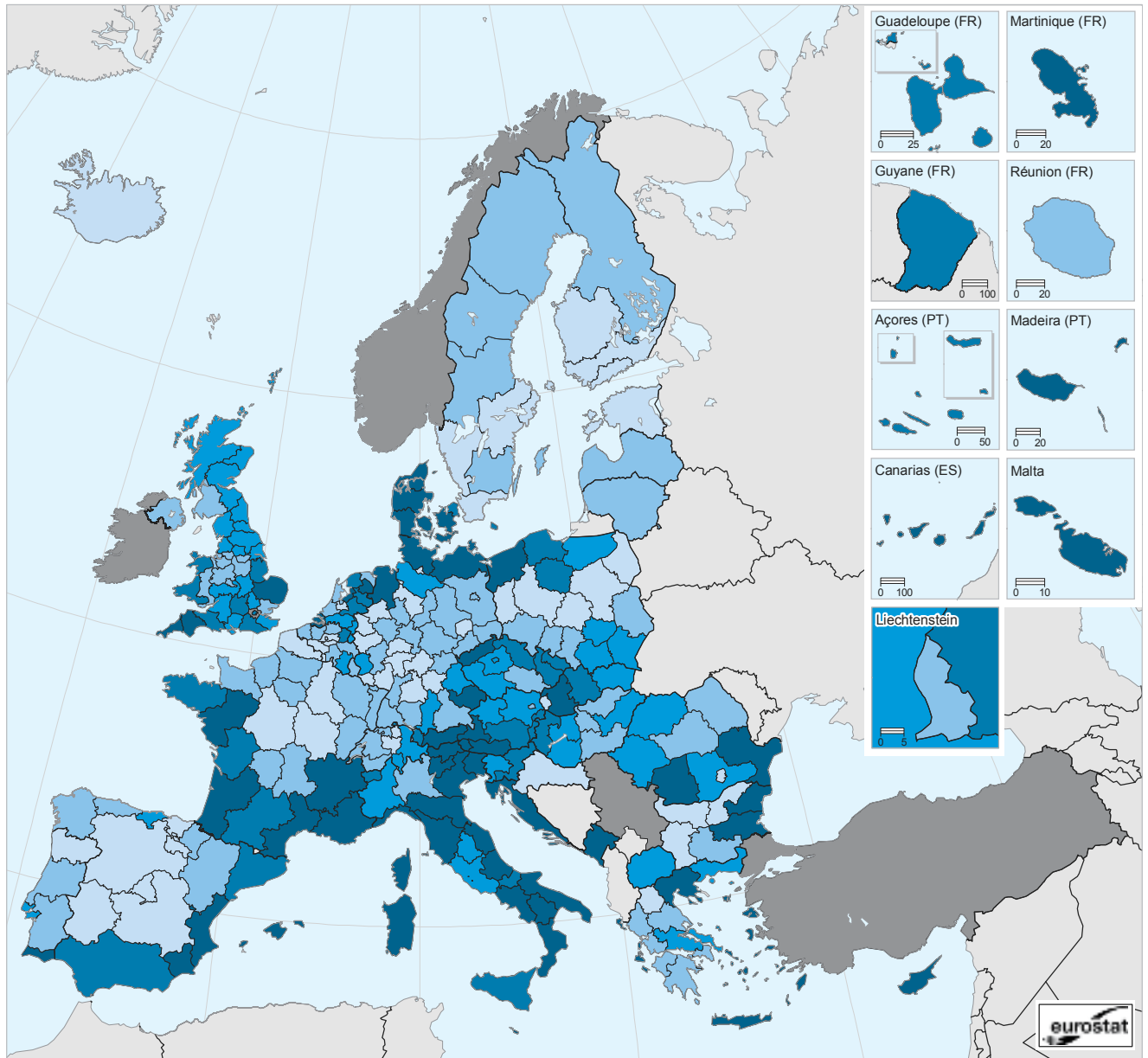


⁽¹⁾ Greece, Sud-Vest Oltenia (RO41) and Outer London (UK12), 2010; Luxembourg, 2009; Ireland, 2006; Switzerland, hotels and campsites only; Ciudad Autónoma de Ceuta (ES63), Ciudad Autónoma de Melilla (ES64), Guadeloupe (FR91), Martinique (FR92), Guyane (FR93) and Réunion (FR94), hotels only; Ireland, national level; United Kingdom and Croatia, population data from 2010.

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



Map 7.7: Average length of stay in hotels, campsites and other collective tourist accommodation, by NUTS 2 regions, 2011 ⁽¹⁾
(days)



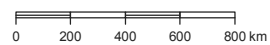
(days)

EU-27 = 3.1



Administrative boundaries: © EuroGeographics © UN-FAO © Turkstat

Cartography: Eurostat — GISCO, 05/2013



⁽¹⁾ Greece and Sud-Vest Oltenia (RO41), 2010; 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.

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



in other collective accommodation establishments, including tourism dwellings.

Map 7.8 gives an overview of the number of bed places in hotels relative to the land area, in other words the density of accommodation in 2011; these figures are presented at NUTS level 3. Regions with a high density 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 lakeland regions as well as in regions with capital and other major cities.

Ranked according to their accommodation capacity in 2011, eight of the top 20 EU regions (NUTS level 3) were in France, six in Spain, five in Italy and one in the United Kingdom. Figure 7.3 shows these top 20 regions with an analysis by type of accommodation: note that the Croatian region of Istarska županija had a total accommodation capacity of 177 000 bed places, which would place it 14th in this list, just above Paris (France). 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: hotels dominated accommodation capacity on Mallorca, as well as in Barcelona and Málaga; campsites were the main type of accommodation capacity in Girona (Costa Brava) and Tarragona (Costa Dorada); and other collective accommodation (for example, tourist dwellings available for rent) provided close to two fifths of the capacity in Alicante/Alacant. Focusing on hotels, there were 11 NUTS level 3 regions in the EU that offered more than 100 000 bed places in hotels in 2011: four in Spain (Mallorca, Barcelona, Madrid and Málaga), three in Italy (Provincia Autonoma di Bolzano/Bozen, Rimini and Roma), and one each in France (Paris), Greece (Dodekanisos), Portugal (Algarve) and Germany (Berlin).

Size of accommodation establishments

Accommodation establishments vary greatly in size. Hotels in the EU-27 had 31 bedrooms with 62 bed places on average, while campsites averaged 354 bed places, and other collective tourism accommodation establishments averaged 24 bed places. The relative importance of different types of accommodation can therefore influence the overall average size of establishments in any region as can other factors, such as location and the type of tourism. Furthermore, many countries have a threshold for their data collection: for example, around one half of the EU Member States exclude smaller hotels, holiday dwellings and other collective accommodation, while around one quarter exclude small campsites. In general these thresholds exclude establishments with 5, 10 or 20 bedrooms or bed places, exceeding this level only in Denmark (40 beds for hotels and 75 pitches for campsites). The exclusion of smaller establishments increases the average size

of establishments. Detailed information is available in the [footnotes](#) for the tourism statistics regional database.

Bearing these limitations in mind, Map 7.9 provides an analysis of the average size of collective tourist accommodation establishments. On a national level, the largest average sizes are found in Denmark (explained at least in part by the thresholds used for data collection) and in Malta (hotels only), while the smallest were in Ireland, Italy and the United Kingdom. The largest average size of collective tourist establishments (at the NUTS level 3) was on the Península de Setúbal in Portugal with 452 bed places per establishment. Four other regions, two in Denmark (Nordjylland and Sydjylland) and one each in Spain (Fuerteventura) and France (les Landes), averaged more than 400 bed places per establishment. All 30 NUTS level 3 regions with an average of less than 20 bed places per establishment were in Ireland, Spain, Italy or the United Kingdom, with two Italian regions and one British region averaging less than 10 bed places per establishment. Among EFTA countries, the range was also large, from an average of 23 bed places in Jura (Switzerland) to more than 400 bed places per establishment in the Norwegian regions of Oslo (429) and Vestfold (410); in general average sizes were high in Norwegian regions and lower in Iceland, Switzerland and, in particular, Liechtenstein. Among the acceding and candidate countries, regional data are available for Croatia and the former Yugoslav Republic of Macedonia. By far the largest average size of establishments was recorded for Istarska županija in Croatia (Istria), where the 584 bed places average was higher than in any region within the EU-27.

Data sources and availability

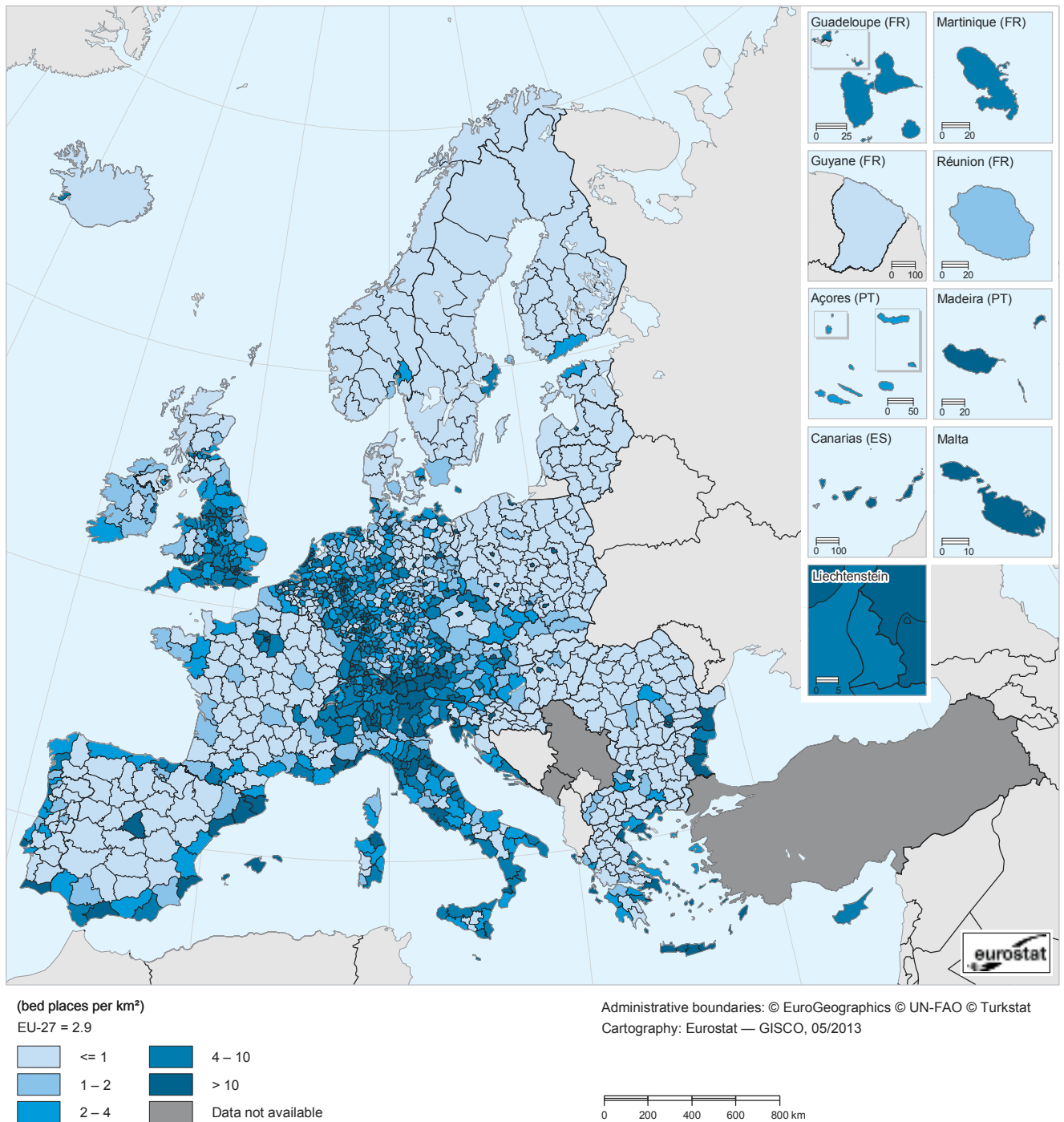
A system of harmonised tourism statistics was established in Council Directive 95/57/EC on the [collection of statistical information in the field of tourism](#). This legal basis requires EU Member States to provide a regular set of comparable tourism statistics. In July 2011 the European Parliament and the Council adopted Regulation EU (No) 692/2011 concerning [European statistics on tourism](#) and repealing Council Directive 95/57/EC; this came into force for the 2012 reference year.

Tourism statistics cover 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 tourism statistics are only available for the supply side, collected via surveys filled in by accommodation establishments.

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

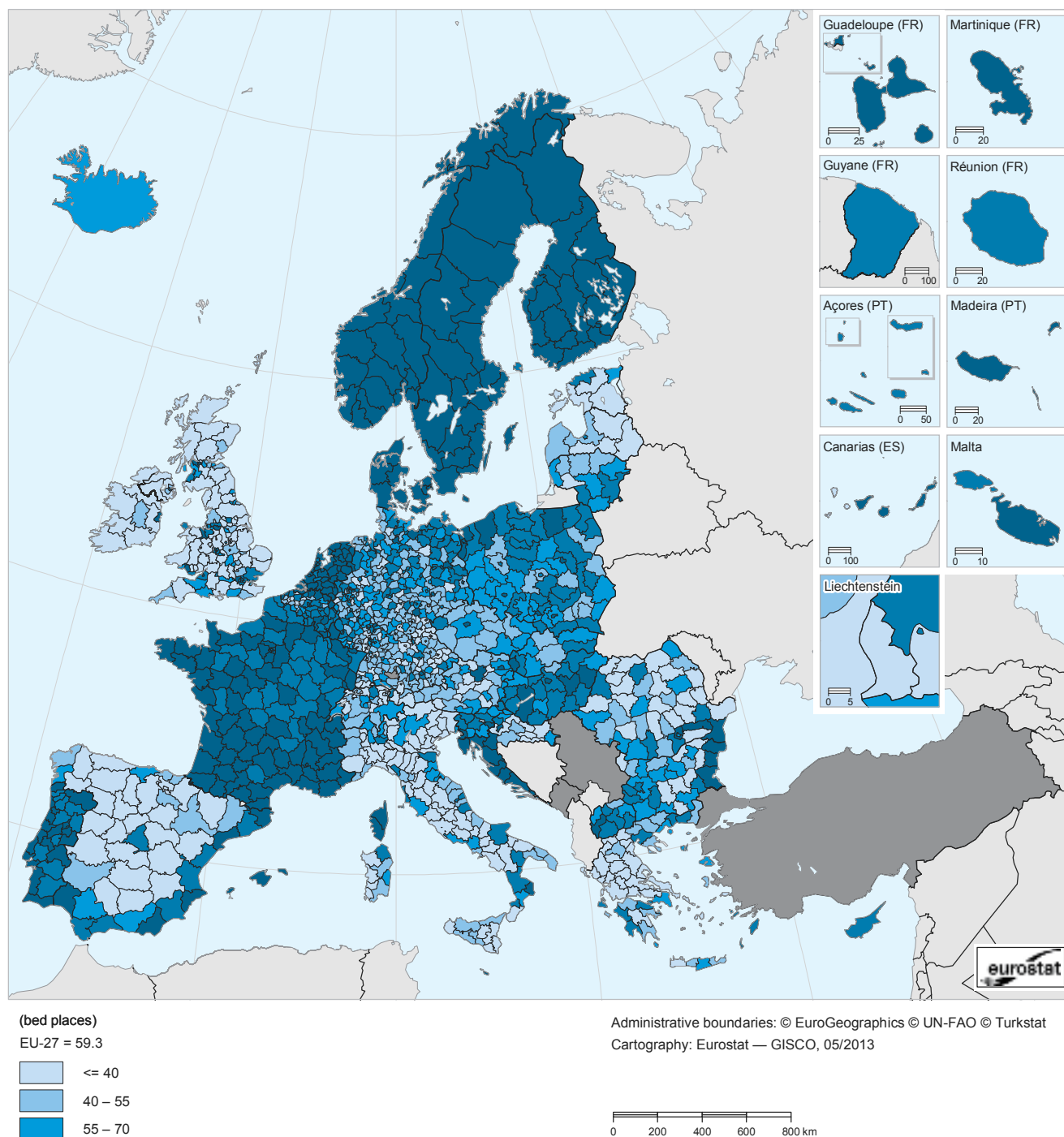


Map 7.8: Density of bed places in hotels relative to land area, by NUTS 3 regions, 2011 ⁽¹⁾
(bed places per km²)



⁽¹⁾ Denmark, Germany, France, Italy, Hungary, Poland, Portugal, Scotland (UKM) and Montenegro, total area instead of land area; Städteregion Aachen (DEA2D), Bautzen (DED2C), Görlitz (DED2D), Meißen (DED2E), Sächsische Schweiz-Osterzgebirge (DED2F), Erzgebirgskreis (DED42), Mittelsachsen (DED43), Vogtlandkreis (DED44), Zwickau (DED45), Leipzig (DED52), Nord-sachsen (DED53), Milano (ITC4C), Monza e della Brianza (ITC4D), Foggia (ITF46), Bari (ITF47), Barletta-Andria-Trani (ITF48), Rimini (ITH59), Pesaro e Urbino (ITI31), Ascoli Piceno (ITI34), Fermo (ITI35), Agglomeratie Leiden en Bollenstreek (NL337), Oost-Zuid-Holland (NL338), Groot-Rijnmond (NL339) and Zuidoost-Zuid-Holland (NL33A), 2012 data for area; Biberach (DE146), 2005.
Source: Eurostat (online data codes: [tour_cap_nuts3](#) and [demo_r_d3area](#))

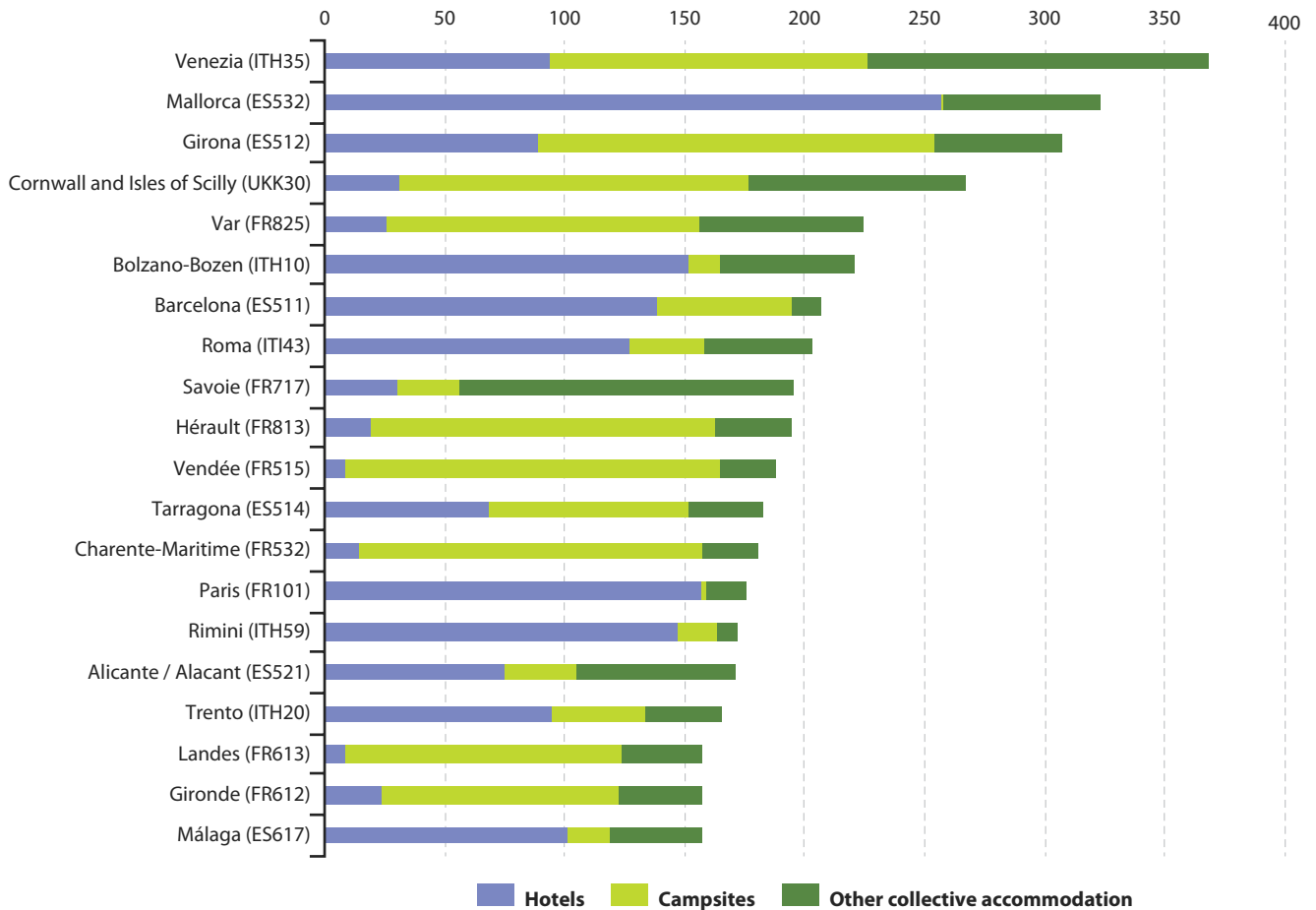
Map 7.9: Average size of collective tourist establishments, by NUTS 3 regions, 2011 ⁽¹⁾
(bed places)



⁽¹⁾ Lovech (BG315) and Iceland, 2010; Départements d'outre-mer (FR9) and Malta, 2009; Germany and Romania, mixed years between 2006 and 2011; Switzerland, hotels only; Iceland, national level.

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

Figure 7.3: EU-27 top 20 regions by accommodation capacity, number of bed places, by NUTS 3 regions, 2011 ⁽¹⁾
(thousand bed places)



⁽¹⁾ Based on available information, data for some regions is missing or only available for a previous reference period.
Source: Eurostat (online data code: [tour_cap_nuts3](#))

business visitors have broadly similar consumption patterns as they both make significant demands on transport, accommodation and restaurant services. To the providers of these services, it may be of secondary interest whether their customers are private tourists or on business.

Context

Tourism diversity

Tourism can play a significant role in the development of European regions. Infrastructure created for tourism purposes contributes to local development, while jobs that are

created or maintained can help counteract industrial or rural decline. Sustainable tourism involves the preservation and enhancement of cultural and natural heritage, ranging from the arts to local gastronomy or the preservation of biodiversity. Indeed, tourism can be 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 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, particularly in southern Europe, and to the Alpine region.



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

Inbound tourism is of particular interest for an analysis of tourism in a given region; these statistics are based on the visitor's usual country of residence, 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 current account deficit or surplus.

Policies

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 regional, 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 final) 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 EU 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.

The EU's cohesion policy for 2007–13 aims to mobilise tourism for sustainable regional development and job creation. Over this period, directly targeted EU support for tourism under the cohesion policy is planned to exceed EUR 6 billion, representing 1.8% of the total budget: EUR 3.8 billion is allocated for the improvement of tourist services, EUR 1.4 billion for the protection and development of natural heritage and EUR 1.1 billion for the promotion of natural assets. In addition, support for tourism-related infrastructure and services can be provided under other headings.