Statistics on tourism for the enlargement countries

2020 edition

The enlargement process in the EU

The accession of any country to the **European Union (EU)** requires that country to respect a range of democratic values, as well as the consent of the EU institutions, all of the EU Member States and the citizens of the new Member State (through their national parliament or a referendum).

As of December 2019, the EU had granted the perspective of membership to five **candidate countries** — Montenegro, North Macedonia, Albania, Serbia and Turkey as well as two **potential candidates** —Bosnia and Herzegovina and Kosovo*.

The process of ensuring compliance with the EU's standards and rules (the EU *acquis* or the body of EU law) is divided into different policy fields, including statistics. Eurostat monitors the progress of candidate countries and potential candidates in complying with the EU *acquis* in the field of statistics, collecting a wide range of data from each of them. These data are considered essential for measuring the progress of reforms, while they are also used to gauge the effectiveness of enlargement policies and assistance programmes. In return, Eurostat provides technical assistance and support to national statistical authorities. The ultimate goal is the provision of harmonised, high quality data that conform to European and international standards. For more information: https://ec.europa.eu/info/policies/eu-enlargement_en.

Tourism statistics

This short guide presents the latest data available for the European Union (EU) and the candidate countries and potential candidates concerning **tourism**. Tourism has the potential to contribute towards employment and economic growth, as well as to development in rural, peripheral or less-developed areas. 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.

It should be noted that no recent tourism data are available for Albania and so the tables and figures in this guide only contain data for the remaining four candidate countries and the two potential candidates.

* This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence.

Main statistical findings

The number of bed places available in hotels and similar accommodation establishments provides one measure of the capacity to attract tourists; note that official tourism statistics include business travellers as tourists alongside individuals travelling for pleasure or other reasons.

The six candidate countries and potential candidates for which data are shown in Table 1 had a combined total of 1.6 million bed places in hotels and similar accommodation establishments in 2018. By comparison, there were 12.1 million bed places in such establishments in the EU-27: the enlargement total was equivalent to 13.5 % of the EU-27 total. Among the candidate countries and potential candidates, Turkey had by far the highest number of bed places in hotels and similar accommodation establishments, with

1.5 million places in 2018, in other words 90 % of the enlargement total. Figure 1 provides information on the development of the number of bed places in hotels and similar accommodation establishments over the period 2008-2018; note that only a short time series is available for Kosovo. In Montenegro, the number of bed places declined sharply between 2009 and 2010, then stabilised and increased slightly between 2015 and 2017; in 2018 there were 13 % less bed places in Montenegro than in 2008. Apart from Montenegro, all candidate countries and potential candidates reported a higher capacity in terms of bed places in 2018 than in 2008. Relatively modest growth was observed in Serbia (up 5 %; note that there is a break in series), while much faster growth was recorded for Turkey (up 54 %), Bosnia and Herzegovina (55 %) and especially for North Macedonia (110 %).

Table 1: Number of bed places in hotels and similar accommodation establishments, 2008-2018
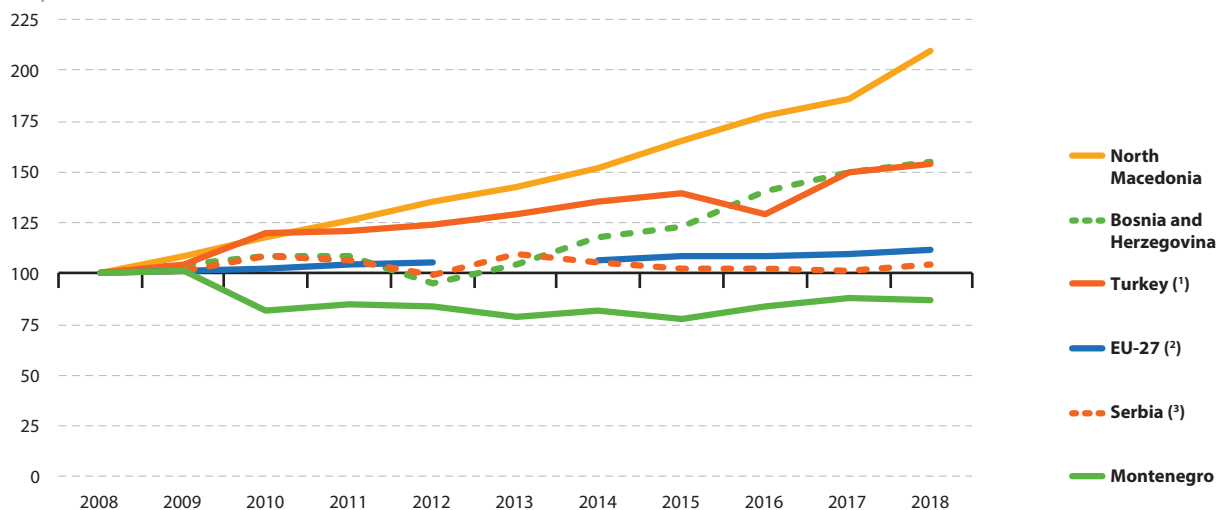(thousands)

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
EU-27	10 887	11 036	11 211	11 369	11 481	:	11 643	11 796	11 841	*11 975*	*12 144*
Montenegro	41	42	34	35	35	33	34	32	35	36	36
North Macedonia	11	12	13	14	15	16	17	18	20	21	23
Albania	:	:	:	:	:	:	:	:	:	:	:
Serbia (¹)	51	52	56	54	51	56	54	52	52	52	53
Turkey (²)	957	1 004	1 145	1 162	1 192	1 237	1 293	1 335	1 233	1 435	1 478
Bosnia and Herzegovina	22	23	24	24	21	23	26	27	31	33	34
Kosovo	:	:	:	:	:	:	:	:	11	11	11

(¹) 2012: break in series.
(²) Tourism and municipality licenced accommodation establishments.

Source: Eurostat (online data code: tour_cap_nat)

Figure 1: Developments for bed places in hotels and similar accommodation establishments, 2008-2018
(2008 = 100)

Note: Kosovo, not available as time series starts in 2016. Albania: not available.

(¹) Tourism and municipality licenced accommodation establishments.
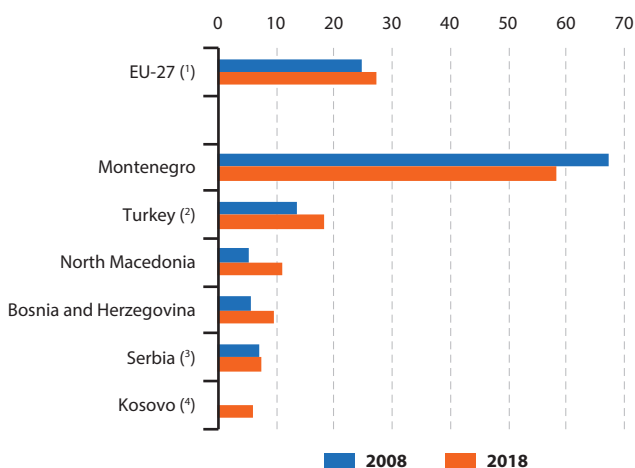(²) 2017 and 2018: estimate. 2013: not available.
(³) 2012: break in series.

Source: Eurostat (online data code: tour_cap_nat)

Figure 2 presents the number of bed places in hotels and similar establishments relative to the size of the national population. The EU-27 recorded a higher capacity of bed places than most of the candidate countries and potential candidates with 27 bed places per 1 000 inhabitants. The one exception was Montenegro where capacity was more than double the EU-27 average, at 58 bed places in hotels and similar accommodation establishments per 1 000 inhabitants, reflecting the importance of tourism to the Montenegrin economy. Turkey was the next closest to the EU-27 average, with 18 bed places per 1 000 inhabitants, while the lowest ratio was observed in Kosovo (6 bed places per 1 000 inhabitants). The fall in the number of bed places in Montenegro between 2008 and 2018 is reflected in this ratio. By contrast, all of the other candidate countries and potential candidates for which 2008 and 2018 data are available saw increases in their number of bed places outstripping the rate of population growth leading to a rise in the ratio of bed places to population size.

Figure 2: **Capacity of bed places in hotels and similar accommodation establishments, 2008 and 2018**
(number of bed places per 1 000 inhabitants)

Note: Albania, not available.

(¹) Break in series. 2018: estimate.
(²) Tourism and municipality licenced accommodation establishments.
(³) Break in series.
(⁴) 2008: not available.

Source: Eurostat (online data codes: tour_cap_nat and demo_pjan)

Table 2 presents information on the number of arrivals in hotels and similar accommodation: it is focused on the arrivals of non-residents, in other words, of international tourists. The largest number of such arrivals across the candidate countries and potential candidates in 2018 was recorded by Turkey, with 31.1 million non-resident arrivals; this was the highest number of non-resident arrivals in Turkey during the period shown in Table 2. Serbia had the second largest number of such arrivals, 1.5 million, around one twentieth of the Turkish total. These figures can be compared with a total of 306.9 million arrivals of non-residents at hotels and similar accommodation establishments in the EU-27 in 2018.

Table 2: Number of arrivals of non-residents staying in hotels and similar accommodation establishments, 2008-2018 (thousands)

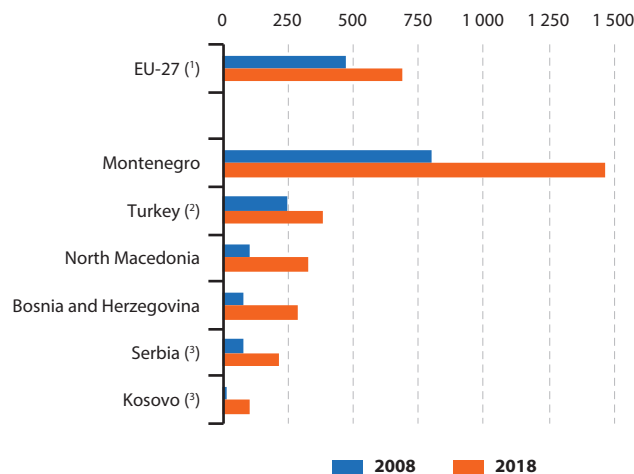|	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
EU-27	*206 852*	194 613	208 787	224 365	229 789	:	251 284	265 146	275 486	*295 898*	*306 924*
Montenegro	492	437	471	499	533	581	557	595	669	795	913
North Macedonia	214	220	231	301	324	373	392	456	489	601	674
Albania	:	:	:	:	:	:	:	:	:	:	:
Serbia (¹)	561	567	618	683	707	767	880	1 013	1 147	1 336	1 514
Turkey (²)	17 714	19 239	25 225	26 016	26 796	26 727	30 253	27 558	17 953	22 923	31 128
Bosnia and Herzegovina	315	304	359	386	424	510	511	640	731	870	994
Kosovo (³)	25	36	34	30	49	50	61	79	164	162	193

(¹) 2012: break in series.
(²) Tourism and municipality licenced accommodation establishments.
(³) 2016: break in series.

Source: Eurostat (online data code: tour_occ_arnat)

In the EU-27 there were 688 arrivals of non-residents in hotels and similar accommodation establishments per 1 000 inhabitants in 2018 (see Figure 3). Again Montenegro recorded a higher ratio than the EU-27, with more non-resident arrivals in hotels and similar accommodation establishments than inhabitants, a ratio of 1 467 per 1 000 inhabitants. Elsewhere this ratio was systematically lower than in the EU-27: the next highest value was recorded for Turkey (385 per 1 000 inhabitants) while the lowest was recorded in Kosovo (107 per 1 000 inhabitants). The EU-27 and all of the candidate countries and potential candidates had more arrivals of non-residents in hotels and similar accommodation establishments per 1 000 inhabitants in 2018 than in 2008.

Figure 3: Arrivals of non-residents in hotels and similar establishments relative to population, 2008 and 2018 (arrivals of non-residents per 1 000 inhabitants)

Note: Albania, not available.

(¹) Estimates. Break in series.
(²) Tourism and municipality licenced accommodation establishments.
(³) Break in series.

Source: Eurostat (online data codes: tour_occ_arnat and demo_pjan)

The total number of nights spent in hotels and similar accommodation establishments in the EU-27 in 2018 was 1 800 million (see Table 3). The six candidate countries and potential candidates for which data are available had a combined total of 205 million nights spent in hotels and similar accommodation establishments in 2018, equivalent to 11.4 % of the EU-27 total. As for the other indicators presented in this guide, Turkey dominated the enlargement total, its 190.4 million nights accounting for 93 % of the total. Serbia and Montenegro reported the next largest numbers of nights spent in hotels and similar accommodation establishments in 2018, 6.1 and 3.8 million respectively. All of the candidate countries and potential candidates reported a higher number of nights spent in their hotels and similar accommodation establishments in 2018 than in 2008.

Table 3: **Number of nights spent at hotels and similar accommodation establishments, 2008-2018**
(millions)

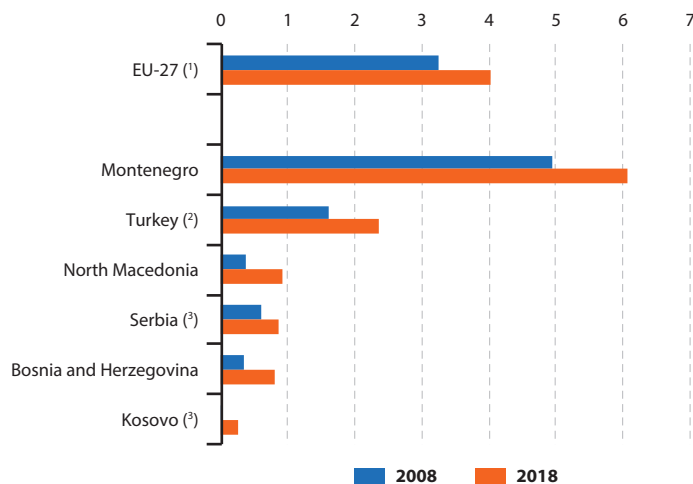|	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
EU-27	1 429.1	1 363.8	1 416.0	1 487.5	1 495.4	:	1 560.3	1 620.2	1 688.8	*1 762.2*	*1 800.2*
Montenegro	3.0	2.4	2.6	2.8	2.8	3.0	2.7	2.9	3.1	3.5	3.8
North Macedonia	0.8	0.7	0.7	0.9	1.0	1.0	1.1	1.2	1.3	1.5	1.9
Albania	:	:	:	:	:	:	:	:	:	:	:
Serbia (¹)	4.3	3.7	3.7	3.8	3.9	4.0	3.9	4.4	5.0	5.6	6.1
Turkey (²)	113.7	123.9	148.9	155.3	171.6	169.3	180.9	176.8	153.5	155.6	190.4
Bosnia and Herzegovina	1.4	1.2	1.4	1.5	1.5	1.7	1.6	2.0	2.2	2.5	2.8
Kosovo (³)	0.1	0.1	0.1	0.1	0.1	0.1	0.2	0.2	0.4	0.4	0.5

(¹) 2012: break in series.
(²) Tourism and municipality licenced accommodation establishments.
(³) 2016: break in series.

Source: Eurostat (online data code: tour_occ_ninat)

One indicator of tourism intensity is the ratio between the number of nights spent in hotels and similar establishments relative to the size of the national population: data for this indicator are shown for 2008 and 2018 in Figure 4. In the EU-27, this ratio had reached 4.0 nights per inhabitant by 2018. As for other indicators, Montenegro had a higher ratio (6.1 nights per inhabitant) than in the EU-27, while Turkey (2.4 nights per inhabitant) had the second highest ratio among the candidate countries and potential candidates. As in the EU-27, all of the candidate countries and potential candidates reported a higher ratio in 2018 than in 2008. Based on this ratio, tourism intensity was more than seven times as high in 2018 as in 2008 in Kosovo (note that there is a break in series) and was more than twice as high in 2018 as in 2008 in North Macedonia as well as in Bosnia and Herzegovina.

Figure 4: **Tourism intensity — number of nights spent at hotels and similar accommodation establishments relative to the population size, 2008 and 2018**
(nights per inhabitant)

Note: Albania, not available.

(¹) 2018: estimate. Break in series.
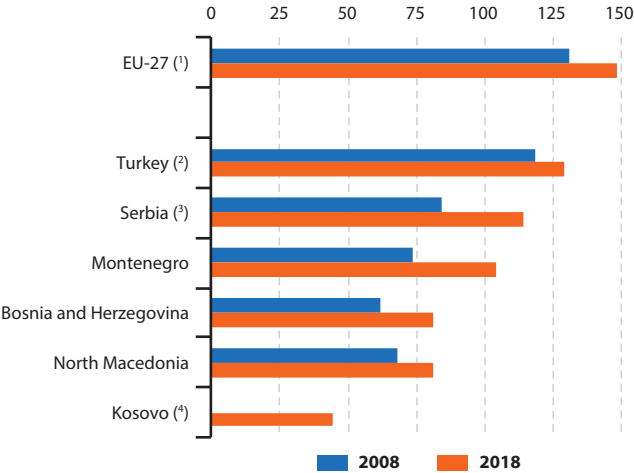(²) Tourism and municipality licenced accommodation establishments.
(³) Break in series.

Source: Eurostat (online data codes: tour_occ_ninat and demo_gind)

The last two figures in this guide — Figures 5 and 6 — combine the previously presented key indicators for hotels and similar accommodation establishments. These show the average number of nights spent per bed place and the average number of nights spent per arrival (resident and non-resident combined).

On average, 148 nights were spent in hotels and similar accommodation establishments in 2018 for each bed place in the EU-27. Among the candidate countries and potential candidates this ratio ranged from 129 nights per bed place in Turkey to 45 nights per bed place in Kosovo. Between 2008 and 2018, this ratio increased in the EU-27 as it did in the five candidate countries and potential candidates for which data are shown (for both years) in Figure 5.

Figure 5: **Average number of nights spent at hotels and similar accommodation establishments per bed place, 2008 and 2018**
(nights per bed place)

Note: Albania, not available.

(¹) 2018: estimate.
(²) Tourism and municipality licenced accommodation establishments.
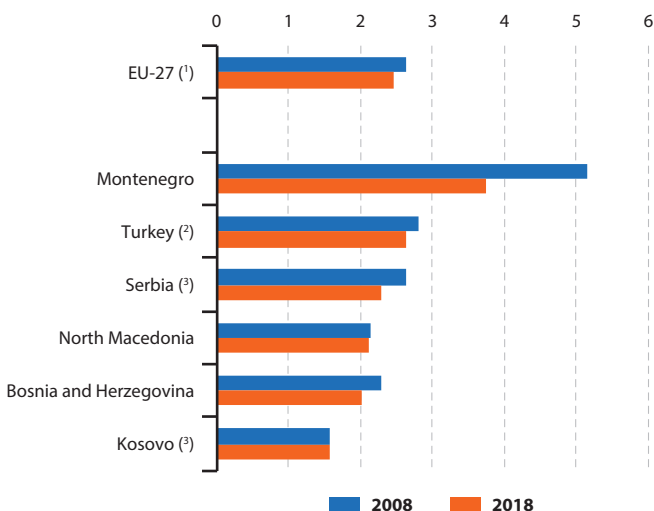(³) Break in series.
(⁴) 2008: not available.

Source: Eurostat (online data codes: tour_cap_nat and tour_occ_ninat)

The average length of stay — in other words the average number of nights spent per arrival — was 2.5 in the EU-27 in 2018. Montenegro again recorded the highest ratio among the candidate countries and potential candidates, its average of 3.7 nights per arrival was clearly above that in the EU-27. Turkey again had the second highest ratio, its 2.6 nights per arrival was just above the EU-27 average. Elsewhere the average number of nights spent per arrival in 2018 ranged from 2.3 in Serbia to 1.6 in Kosovo.

Figure 6: **Average number of nights spent at hotels and similar accommodation establishments per arrival, 2008 and 2018**
(nights per arrival)

Note: Albania, not available.

(¹) 2018: estimate.
(²) Tourism and municipality licenced accommodation establishments.
(³) Break in series.

Source: Eurostat (online data codes: tour_occ_arnat and tour_occ_ninat)

Further information

Data were extracted on 12 March 2020

Symbols

:   not available
Italics value is either an estimate or provisional

Eurostat's website

Eurostat's website (https://ec.europa.eu/eurostat) provides free access to its statistics; it is available in English, French and German. Eurostat online data codes, which are given in the source under each table or figure, provide users with a quick and efficient way to access the most up-to-date statistics. When entered in the 'search' facility on Eurostat's website, these codes provide users with the freshest data and longer time series.

Statistics Explained

Statistics Explained (https://ec.europa.eu/eurostat/statistics-explained/index.php) is a wiki-based system that presents statistical topics in an easy to understand way; it is composed of articles that together make up an encyclopaedia of statistics. There is a wide range of articles on enlargement countries

Statistical articles on enlargement:

https://ec.europa.eu/eurostat/statistics-explained/index.php/Enlargement_countries_-_statistical_overview

Background information on enlargement:

https://ec.europa.eu/eurostat/statistics-explained/index.php/Enlargement_policy_and_statistical_cooperation

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