Tourism has the potential to play a significant role in the economic aspirations of many European Union (EU) regions and can be of particular importance in remote/peripheral regions, such as the EU’s coastal, mountainous or outermost regions. Infrastructure that is created for tourism purposes contributes to local and regional development, while jobs that are created or maintained can help counteract industrial or rural decline. However, (mass) tourism can have negative consequences, as excess demand puts a strain on local infrastructure and may be a nuisance to local communities, while tourists may impact the environment locally through noise, pollution, waste and wastewater, habitat loss and globally through transport-related emissions.

According to the United Nations World Tourism Organisation (UNWTO), the number of global tourist arrivals continued to grow in 2018, maintaining a pattern of positive annual rates since 2009. EU Member States are among the world’s leading tourist destinations — France, Spain, Italy and Germany were all present among the top 10 global destinations. The wealth of European cultures, the variety of its landscapes and the quality of its tourist infrastructure are likely to be among the varied reasons why more than one third of the world’s international tourists took their holidays in the EU-27.

This article presents information on regional patterns of tourism across the EU. Its main focus is the provision...
of tourist accommodation services, as measured by the number of nights spent; it concludes with information by degree of urbanisation and data relating to the sustainability of tourism.

Number of nights spent

Tourism, in a statistical context, refers to the activity of visitors taking a trip to a destination outside their usual environment, for less than a year. It is important to note that this definition is wider than the common everyday definition, insofar as it encompasses not only private leisure trips but also visits to family and friends, as well as business trips.

In 2018, there were 2.8 billion nights spent in tourist accommodation across the EU-27. This figure refers to the total number of nights spent by all tourists and reflects both the length of stay and the number of tourists. It is considered a key indicator for analysing the tourism sector, even if it does not cover stays at non-rented accommodation nor same-day visits.

Map 1 shows information on the number of nights spent in tourist accommodation by both residents and non-residents for NUTS level 2 regions. In 2018, there were 25 regions in the EU (out of 238 for which data are available; note that data for Ireland are presented at a national level) where at least 30.0 million nights were spent in tourist accommodation. This list was largely composed of coastal regions, underlining that the beauty, culture and diversity of the EU’s coastal regions has made them a preferred destination for many holidaymakers. A total of 1.3 billion nights were spent in tourist accommodation across these 25 regions. As such, approximately one tenth of the EU regions accounted for a cumulative share of close to 45% of the total nights spent. This high concentration of tourist numbers in relatively few locations has led to concerns around sustainable development.
Nights spent in tourist accommodation, 2018
(million nights spent, by NUTS 2 regions)

Note: Scotland (UKM), NUTS 1 region; Ireland and Serbia: national data. EU-27 and Ireland: estimates. Ile-de-France (FR10), Centre — Val de Loire (FRB0), Franche-Comté (FRC2), Basse-Normandie (FRD1), Nord-Pas de Calais (FRE1), Alsace (FRF1), Lorraine (FRF3), Poitou-Charentes (FRK0), Auvergne (FRK1), Guadeloupe (FRY1), Martinique (FRY2), Guyane (FRY3) and Zürich (CH59): low reliability. Slovenia and Montenegro: 2017. Ireland, the United Kingdom, Iceland, Norway, Switzerland, Serbia and Turkey: 2016.
Source: Eurostat (online data code: tour_occ_nin2)

Map 1: Nights spent in tourist accommodation, 2018(million nights spent, by NUTS 2 regions)Source: Eurostat (tour_occ_nin2)
The three regions with the highest number of tourist nights in the EU were the island region of Canarias (Spain), Île-de-France (the French capital) and Jadranska Hrvatska (on the Adriatic coast in Croatia).

The list of the EU regions with the highest numbers of tourist nights in 2018 is dominated by coastal regions around the Mediterranean Sea. Nevertheless, the highest number of nights spent in tourist accommodation was recorded in Spain’s Atlantic island destination of Canarias (99.9 million). Several other coastal regions featured in the top 10: the Adriatic region of Jadranska Hrvatska (Croatia; 84.8 million), four more Spanish regions — Cataluña (81.8 million), Illes Balears (70.2 million), Andalucía (69.6 million) and Comunidad Valenciana (49.8 million) — Veneto (Italy; 69.2 million) and Provence-Alpes-Côte d’Azur (France; 54.8 million). The top 10 was completed by two non-coastal regions, both of which were located in France: the capital region of Île-de-France (which had the second highest number of nights spent in tourist accommodation at 86.0 million) and Rhône-Alpes (50.9 million).

In 2018, there was an annual increase of 2.6 % in the number of nights spent in EU-27 tourist accommodation.

Between 2010 and 2018, the number of nights spent in EU-27 tourist accommodation increased by 28.7 % overall. Annual increases ranged between 1.5 % and 5.0 % per year over this period, with the latest annual growth rate — for 2018 — equal to 2.6 %.

Map 2 presents regional information for the annual rate of change in the total number of nights spent in tourist accommodation between 2017 and 2018. More than four fifths of NUTS level 2 regions recorded an increase in their number of nights spent during this period (as shown by the blue shades in Map 2). This was the case for 199 out of the 238 EU regions for which data are available (note again that data for Ireland are presented at a national level). There were three regions where the change in the number of nights spent was less than 0.1 % (also shown in blue), while the remaining 36 regions recorded a decline (as shown by the orange shades).

Between 2017 and 2018, approximately one third of all EU regions recorded an increase of at least 5.0 % in their total number of nights spent in tourist accommodation. The highest growth rates were recorded in Ipeiros (north-west Greece; 28.5 %), Groningen (the Netherlands; 21.2 %) and Notio Aigaio (a Greek island region in the southern Aegean; 17.1 %). Among these, Notio Aigaio was the only region with high levels of tourism (30.8 million nights spent in 2018), while Ipeiros and Groningen both had less than 3.0 million.

An analysis of the top 10 tourist destinations in the EU reveals a variety of developments between 2017 and 2018. Among these regions, Île-de-France recorded by far the highest growth rate in terms of nights spent (up 7.3 %). By contrast, there was a decline in the total number of nights spent in Provence-Alpes-Côte d’Azur and in four of the top five Spanish destinations (the exception being Andalucía). The largest decline among these regions was recorded in Canarias (-4.3 %), which nevertheless remained the most frequented destination in the EU.
Map 2: Annual rate of change for nights spent in tourist accommodation, 2017-2018 (% by NUTS 2 regions)

Note: Scotland (UKM), NUTS 1 region. Ireland and Serbia: national data. EU-27, Ireland and Greece: estimates. Ile-de-France (FR10), Centre Val de Loire (FRB0), Franche-Comté (FR20), Région Normandie (FRA1), Nord-Pas-de-Calais (FRE1), Alsace (FRF1), Lorraine (FRF3), Poitou-Charentes (FRG3), Auvergne (FRK1), Guadeloupe (FRY1), Martinique (FRY2) and Guyane (FRY3): low reliability. Slovenia: 2015-2017. Ireland, the United Kingdom, Iceland, Norway, Serbia and Turkey: 2015-2016.

Source: Eurostat (online data code: tour OCC Nin2)

Tourism statistics at regional level
The three destinations with the highest number of nights spent by resident tourists were French: Île-de-France, Provence-Alpes-Côte d’Azur and Rhône-Alpes

In 2018, domestic tourists (hereafter referred to as resident tourists) accounted for 1.5 billion nights spent in tourist accommodation across the EU-27. This figure was 10% higher than the 1.3 billion nights spent by international (or non-resident) tourists; note that the latter includes tourists from other EU Member States as well as from non-member countries.

Figure 1 presents the most frequented tourist destinations for both resident and non-resident tourists. The ranking for resident tourists is dominated by relatively large EU Member States, as they have a larger number of potential clients. In 2018, the three most frequented regions across the EU for resident tourists were all located in France. There were 38.6 million nights spent by residents in tourist accommodation within Île-de-France, while Provence-Alpes-Côte d’Azur (37.1 million) and Rhône-Alpes (35.7 million) recorded almost as many nights. Within Spain, Andalucía had the highest number of nights spent by residents (31.5 million), across Italy the most frequented region for resident tourists was Emilia-Romagna (29.8 million), while Schleswig-Holstein had the highest number of nights spent by residents in Germany (28.8 million).

The second half of Figure 1 shows that non-resident tourists often flocked to the most frequented holiday destinations in the EU. The large number of nights spent by international tourists in some of these regions may result in considerable pressures on the environment and sustainability, especially as many non-residents arrive by air (particularly for some of the island regions) and tend to travel during high/peak seasons. In 2018, three of the top four most frequented destinations in the EU for non-residents were located in Spain: Canarias (88.2 million nights in tourist accommodation), Illes Balears (64.0 million) and Cataluña (54.4 million). The second most frequented destination for non-residents was Jadranska Hrvatska (79.7 million).

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**Figure 1: Top tourist regions in the EU, 2018 (million nights spent in tourist accommodation, by NUTS 2 regions)**

Source: Eurostat (tour_occ_nin2)
More than 19 out of 20 nights spent in Kriti and Malta were attributed to non-resident tourists.

Figure 2 extends the analysis of the most frequented destinations by providing information about those regions that were most dependent upon resident and non-resident tourists. In 2018, residents accounted for 52.4% of the total number of nights spent in EU-27 tourist accommodation.

There were 16 NUTS level 2 regions where at least 90.0% of nights spent in tourist accommodation in 2018 were attributed to residents. The highest share (96.1%) was recorded in Mecklenburg-Vorpommern (Germany) on the Baltic Sea, followed by two regions from Romania: Sud-Vest Oltenia (94.9%) and Sud-Est (94.6%). Just over half (11) of the 20 regions with the highest resident shares were located in Germany.

Non-resident tourists accounted for a majority of the nights spent in many of the EU’s most frequented tourist destinations. This was most notably the case in the Greek island region of Kriti — where 96.0% of nights spent in tourist accommodation in 2018 were attributed to non-residents. There were also very high shares for non-residents in Malta (95.8%) and Cyprus (94.7%). Aside from coastal and island destinations, non-resident tourists also accounted for a fairly high proportion of the total nights spent in the mountainous western Austrian regions of Tirol and Vorarlberg, as well as several capital regions, for example Praha, Budapest, Wien and Bruxelles/Brussels.

Figure 2: Nights spent in tourist accommodation, 2018(%, share of total nights spent by residents and non-residents, by NUTS 2 regions)

Source: Eurostat (tour_occ_nin2)

Almost three fifths of the nights spent by non-resident tourists in the EU-27 were in coastal areas. Coastal areas, from a statistical context, consist of local administrative units (LAUs) or municipalities that border the sea, or have at least half of their total surface area within 10 km of the sea. Note that five EU Member States — Czechia, Luxembour, Hungary, Austria and Slovakia — are landlocked.
Figure 3 presents information on nights spent in coastal tourist accommodation, with an analysis for residents and non-residents. In 2018, almost three fifths (57.3 %) of the total nights spent by non-residents in EU-27 tourist accommodation were in coastal areas. The proportion of non-resident holidaymakers to visit coastal areas was usually higher in southern and eastern EU Member States characterised by climatic conditions conducive to beach holidays. More than four fifths of the total nights spent by non-residents in Malta, Greece, Cyprus, Croatia, Portugal, Spain and Bulgaria were in coastal areas, although a small majority of nights spent by non-residents in Italy were in non-coastal areas.

In 2018, less than two fifths (38.4 %) of the total nights spent by residents in EU-27 tourist accommodation were in coastal areas — perhaps reflecting a higher proportion of nights linked to business travel or visits to towns and cities. This pattern was most apparent in Romania, Germany, Poland and Slovenia, where less than one quarter of all nights spent by resident tourists were in coastal areas.

Non-resident tourists were generally more likely (than residents) to spend their holidays in coastal areas. For example, in 2018 almost 9 out of every 10 (87.2 %) nights spent by non-residents in Spain were in coastal areas, whereas the corresponding share for residents was less than three fifths (57.8 %). A similar pattern was observed in three other southern EU Member States: Portugal, Cyprus and Greece. It was also repeated in two eastern holiday destinations, Bulgaria and Croatia. The disparity between resident and non-resident tourists was even greater in Bulgaria than it was in Spain, as 80.9 % of the total nights spent by non-residents were in coastal areas, compared with 36.4 % among residents.
Nights spent in tourist accommodation by degree of urbanisation

Figure 4 provides a distribution by degree of urbanisation of the number of nights spent in tourist accommodation; the information presented covers both resident and non-resident tourists. This territorial typology categorises 1 km² grid cells according to the spatial distribution of population into one of three classes: cities, towns and suburbs, and rural areas.

In 2018, the total number of nights spent in EU-27 tourist accommodation was evenly distributed: the highest share was recorded for towns and suburbs (34.0 %), while slightly fewer nights were spent in cities (33.4 %) and in rural areas (32.6 %).

Cities were the most frequented destination for tourists in 13 of the 27 EU Member States. In 2018, they accounted for almost two thirds of the total nights spent in Latvia (66.3 %) and for more than half of the nights spent in another Baltic Member State — Estonia (55.7 %). By contrast, more than half of the tourist nights spent in Malta (52.3 %) and Spain (50.9 %) were in towns and suburbs, while an additional five Member States also reported that towns and suburbs were their most frequented destination (although they did not account for an overall majority of tourist nights spent). In a similar vein, more than half of all tourist nights spent in Denmark (52.6 %) were in rural areas, with this share reaching almost two thirds in Croatia (64.0 %), Greece (65.3 %) and Austria (66.4 %) — these nights spent in rural areas in Denmark, Greece and Croatia were in predominantly coastal regions, while those spent in Austria were in predominantly alpine regions.

Figure 4: Nights spent in tourist accommodation, 2018(% share of total nights spent in tourist accommodation, by degree of urbanisation)Source: Eurostat (tour_occ_ninatd)
Tourism pressures

Since the advent of mass tourism in the 1950s and 1960s, EU regions have been affected by tourism in different ways. Some regions continue to receive very few visitors, while others have seen their numbers of tourists grow at a rapid pace. The vast majority of regions receive the bulk of their visitors during a single season, although others have a more steady flow of tourists year-round (note that from 2021 onwards, Eurostat will publish regional accommodation statistics broken down by month). Sustainable tourism involves the preservation and enhancement of cultural and natural heritage, including the arts, gastronomy or the preservation of biodiversity. The success of tourism is, in the long-term, closely linked to its sustainability, with the quality of destinations often influenced by their natural and cultural environment.

Tourism density — defined here as the relationship between the total number of nights spent and the total area of each region — provides one measure that may be used to analyse sustainability issues. In 2018, there were, on average, some 656 nights spent in tourist accommodation for every square kilometre (km²) across the EU-27 territory. Tourism density was generally high in regions where space was at a premium: capital regions, other major metropolitan regions, and some coastal (particularly island) regions. By contrast, tourism density was relatively low in many eastern and northern regions of the EU, as well as most interior regions of France and Spain.

There were nine NUTS level 2 regions in the EU where tourism density in 2018 stood at more than 10 000 nights per km² (as shown by the darkest shade in Map 3). The highest ratios were recorded in capital regions: Région de Bruxelles-Capitale/Brussels Hoofdstedelijk Gewest (43 435), Wien (38 178), Praha (36 793) and Berlin (36 636). Regional tourism density was also high in three island destinations that attract tourists year-round: Malta (32 068), Illes Balears (14 066) and Canarias (13 415). There were two other regions that recorded ratios of more than 10 000 nights spent per km²: Hamburg in Germany (19 183) and Ciudad Autónoma de Melilla in Spain (11 597). Note these density ratios are influenced by the administrative boundaries that delineate each region. For example, the four capital regions mentioned above each cover an area of less than 1 000 km². By contrast, the French capital region of Île-de-France — which is the second most frequented tourist destination in the EU — has an area of 12 000 km²; a high proportion of its visitors stay within the city boundaries of Paris (103 km²).
Map 3: Nights spent in tourist accommodation relative to total area, 2018 (nights spent in tourist accommodation per km², by NUTS 2 regions)

Tourism statistics at regional level
Source data for figures and maps

Tourism at regional level

Data sources

Eurostat’s tourism statistics consist of two main components: on the one hand, statistics relating to the capacity and occupancy of collective tourist accommodation; on the other, statistics relating to tourism demand. In most EU Member States, the former are collected via surveys filled in by accommodation establishments, while the latter are usually collected via traveller surveys at border crossings or through household surveys.

Since 2012, the legal basis for the collection of tourism statistics has been a Regulation of the European Parliament and of the Council concerning European statistics on tourism ((EU) No 692/2011) and a European Commission implementing regulation ((EU) No 1051/2011).

Tourism statistics may be analysed according to the tourist’s country of residence (not the tourist’s citizenship). Domestic tourism covers the activities of residents who stay in their own country (but outside their usual environment) and this may be contrasted with the activities of international tourists (often referred to as inbound or non-resident tourists).

Tourist accommodation establishments are local kind-of-activity units. They include all types of tourist accommodation providing, as a paid service, accommodation for tourists, regardless of whether or not the provision of tourist accommodation is the main or a secondary activity. These establishments are defined according to the activity classification, NACE, as units providing short-term or short-stay accommodation services as a paid service:

- **hotels and similar accommodation (NACE Group 55.1)** — includes accommodation provided by hotels, resort hotels, suite/apartment hotels, motels;
- **holiday and other short-stay accommodation (NACE Group 55.2)** — includes holiday homes, visitor flats and bungalows, cottages and cabins without housekeeping services, youth hostels and mountain refuges;
- **campinggrounds, recreational vehicle parks and trailer parks (NACE Group 55.3)** — includes the provision of accommodation in campgrounds, trailer parks, recreational camps, and fishing and hunting camps for short-stay visitors.

Regional tourism statistics are only available from suppliers of tourism services and are collected through surveys of tourist accommodation establishments. These surveys provide information that covers tourism capacity (counts of establishments, rooms and bed places) and occupancy (the number of arrivals and nights spent). The data may be analysed by NUTS level 2 regions, by degree of urbanisation, and for coastal/non-coastal areas.

Context

The EU’s competence in the area of tourism is one of support and coordination in relation to the actions of individual EU Member States. Policymakers seek to maintain the EU’s position as a tourist destination while supporting the contribution of tourism related activities to overall growth and employment.

A European Commission 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 and remains in force. It provides a framework for the development of tourism within the EU, with four priority areas for action: stimulate competitiveness; promote sustainable and responsible tourism; consolidate Europe’s image as a collection of sustainable, high-quality destinations; maximise the potential of policies/financial instruments for developing tourism in the EU.

The European Commission has encouraged the diversification of the EU’s tourism offer through initiatives relating to maritime/coastal tourism, sustainable tourism, cultural tourism, tourism for all, accessible tourism, low-season tourism or collaborative tourism. To enhance the visibility of the EU as a tourist destination and increase international tourist arrivals, the European Commission undertakes a wide range of communication and promotion activities. Furthermore, it provides ad-hoc grants to the European Travel Commission (ETC).
, a non-profit organisation responsible for promoting Europe as an international tourist destination through reports, handbooks and websites (such as visiteurope.com).

The EU is a key cultural tourism destination thanks to its heritage that includes museums, theatres, archaeological sites, historical cities, industrial sites as well as music and gastronomy. The EU promotes a balanced approach between the needs to boost growth on one side, and the preservation of artefacts, historical sites, and local traditions on the other. Cultural tourism provides an opportunity to showcase European heritage, for example, through establishing cultural routes.

In its communication on maritime and coastal tourism A European strategy for more growth and jobs in coastal and maritime tourism (COM(2014) 86 final), the European Commission reflected on the diversity of the EU’s coastal regions and their capacity to generate wealth and jobs by fostering ‘a smart, sustainable and inclusive Europe’ in line with the Blue growth strategy: opportunities for marine and maritime sustainable growth (COM(2012) 494 final). With this in mind, policymakers are seeking to redefine ‘mass-tourism’ and to develop new forms of ‘niche’ tourism which focus on sustainable solutions from an economic, social and environmental point of view.

COVID-19 put considerable pressure on the EU’s tourism and travel-related activities. On 13 May 2020, the European Commission adopted a comprehensive package of initiatives to allow for a coordinated framework to resume activities, while addressing pressing issues for tourism operators and consumers. It included guidance, among other issues, on: health and safety protocols; restoring free movement across the EU in a gradual and coordinated way; making travel vouchers an attractive alternative to cash reimbursement for consumers. The principal goals were to help public authorities and enterprises to plan and prepare for the gradual relaxation of lockdown rules, while providing reassurance to EU citizens that would allow them to plan future holidays. At the centre of the package was a communication that provided a strategy to stimulate the recovery of tourism and transport in 2020 and beyond (COM(2020) 550 final).

Other articles
- Tourism industries — economic analysis
- Tourism introduced
- Tourism statistics
- Tourism trips of Europeans (online publication)

Publications
- Recent Eurostat publications on tourism
- Eurostat regional yearbook
- Tourism satellite accounts — 2019 edition

Main tables
- Regional statistics (t_reg), see:
  - Regional tourism statistics (t_reg_tour)
- Tourism (t_tour), see:
  - Annual data on tourism industries (t_tour_inda)
  - Occupancy of tourist accommodation establishments (t_tour_occ)
Nights spent at tourist accommodation establishments by NUTS 2 regions (tgs00111)
Nights spent at tourist accommodation establishments by degree of urbanisation (from 2012 onwards) (tin00179)

Database

- Regional statistics by NUTS classification (reg), see:

Regional tourism statistics (reg_tour)
  Occupancy in collective accommodation establishments: domestic and inbound tourism (reg_tour_occ)

- Tourism (tour), see:

Annual data on tourism industries (tour_inda)
  Occupancy of tourism accommodation establishments (tour_occ)
    Nights spent by residents and non-residents (tour_occ_n)
    Nights spent at tourist accommodation establishments by NUTS 2 regions (tour_occ_nin2)
    Nights spent at tourist accommodation establishments by degree of urbanisation (from 2012 onwards) (tour_occ_ninatd)
    Nights spent at tourist accommodation establishments by coastal and non-coastal area (from 2012 onwards) (tour_occ_ninate)

Dedicated section

- Regions and cities
- Tourism

Data visualisation

- Eurostat statistical atlas (Chapter 10)
- Regional statistics illustrated

Methodology

- Tourism — Methodology — Metadata, manuals and guidelines

Metadata

- Occupancy of tourist accommodation establishments (ESMS metadata file — tour_occ_esms)

Legislation

- Regulation (EU) No 1051/2011 of 20 October 2011 implementing Regulation (EU) No 692/2011 concerning European statistics on tourism, as regards the structure of the quality reports and the transmission of the data

Tourism statistics at regional level
External links


- Europe, the world’s No 1 tourist destination — a new political framework for tourism in Europe — Communication from the Commission COM(2010) 352 final of 30 June 2010

- European Commission — Internal Market, Industry, Entrepreneurship and SMEs — Overview of EU tourism policy

- European Commission — Regional policy — Tourism

- UNWTO tourism highlights — 2019

Maps can be explored interactively using Eurostat’s statistical atlas (see user manual).

This article forms part of Eurostat’s annual flagship publication, the Eurostat regional yearbook.