

Tourism

9



Introduction

This chapter presents regional patterns of **tourism** across 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.

The statistical definition of tourism is broader than the common definition employed on an everyday basis, as it encompasses not only private trips but also business trips. This is primarily because tourism is viewed from an economic perspective, whereby private visitors on holiday and visitors making business trips have broadly similar consumption patterns (transport, accommodation and restaurant / catering services). As such, it may be of secondary interest to providers of tourism services whether their customers are private tourists on holiday or visitors on a business trip.

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 service sectors also benefit considerably from the additional demand generated by tourists, as can the construction sector (for more information refer to the chapter on Structural business statistics).

Tourism has the potential to play a significant role in the development of European regions, contributing to employment and wealth creation, sustainable development, enhanced cultural heritage, and the overall shaping of European identity. Infrastructure created for tourism purposes may contribute more generally to local economic development, while jobs that are created (or maintained) can help counteract industrial or rural decline.

Tourism can be particularly significant in remote, peripheral regions, where tourism-related services are often one of the main sources of income for the local population; this especially applies in many of Europe's island states and regions, as well as in coastal and Alpine regions. The main beneficiaries of increased demand for tourism-related services in remote regions tend to be **small and medium-sized enterprises (SMEs)**.

Policies

The **Lisbon Treaty** acknowledged the importance of tourism, outlining a specific competence for the EU in this field to support, coordinate and complement Member States' actions and encourage the creation of a favourable environment for undertakings in the sector, while tourism is covered by a range of regional, national and EU policies. Tourism impacts on a wide range of policy areas, including

regional policy, the diversification of rural economies, maritime policy, sustainability and competitiveness, social policy and inclusion (tourism for all).

A **European Commission** communication titled '**Europe, the world's No. 1 tourist destination — a new political framework for tourism in Europe**' (COM(2010) 352) was adopted in June 2010. It encourages 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. Four priorities for action were identified, to: stimulate competitiveness; promote sustainable and responsible tourism; consolidate Europe's image as a collection of sustainable, high-quality destinations; and maximise the potential of EU policies and financial instruments for developing tourism.

The competitiveness of the EU's tourism sector is closely linked to its sustainability, as the quality of tourist destinations is strongly influenced by their natural and cultural environment and their integration into the local community. Sustainable tourism involves the preservation and enhancement of cultural and natural heritage, including the arts, local gastronomy or the preservation of biodiversity. Major challenges for sustainable tourism include: preserving natural and cultural resources; limiting negative impacts at tourist destinations, including the use of natural resources and waste production; promoting the well-being of the local community; reducing the seasonality of demand; limiting the environmental impact of tourism-related transport; and making tourism accessible to all. An important number of sustainable transnational thematic tourism products and services have been developed with potential to contribute to tourism growth (such as cultural routes crossing several countries, cycling paths, eco-tourism products, eno-gastronomic tourism, protected natural sites, or tourism capitalising on industrial heritage).

Coastal and maritime tourism is the largest maritime activity in Europe and closely linked to other parts of the economy; it employs almost 3.2 million people, while almost half of all nights spent in EU accommodation establishments are in coastal localities. In a communication on maritime and coastal tourism titled '**A European strategy for more growth and jobs in coastal and maritime tourism**' (COM(2014) 86), the European Commission reflected on the diversity of the EU's coastal regions and their capacity to generate wealth and jobs, in line with the EU's '**Blue growth strategy**' (COM(2012) 494). To help small and medium-sized enterprises face a variety of challenges, to address cross-border challenges within the EU, and to promote cooperation and sharing of best practices, the aforementioned Communication proposes a joint European framework with a range of different initiatives, such as: stimulating performance and competitiveness; promoting skills and innovation; strengthening sustainability; or maximising available EU funding.

The continued globalisation of tourism opens up new opportunities, with tourists from new markets able to afford high-value vacations: the European Commission has focused on encouraging the diversification of the **European tourism offer** by, amongst others, the development and promotion of transnational thematic tourism products, as well as by developing and enhancing the visibility of European cultural routes and of small, non-traditional tourism destinations that are committed to social, cultural and environmental sustainability, through the **European**

destinations of excellence (EDEN) initiative. Furthermore, in order to maintain and strengthen Europe's position as a top world tourist destination, in an increasingly competitive world, the European Commission deployed a wide range of **communication and promotion activities** and is closely cooperating with the **European Travel Commission (ETC)** — an organisation representing the national tourism organisations from 33 European countries — to promote Europe in key long-haul markets.



TOURISM — COHESION POLICY FUNDING

Structural and cohesion funds provide essential support to improve the competitiveness and quality of tourism at regional and local levels, viewing tourism as an important tool for integrating less developed regions.

The EU's cohesion policy for 2007–13 aimed to mobilise tourism for sustainable regional development and job creation. Over this period, targeted EU support for tourism under the cohesion policy was planned to exceed EUR 6 billion, representing 1.8 % of the total cohesion policy budget. Of this, EUR 3.8 billion was 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.

For more information:

Cohesion policy and tourism: http://ec.europa.eu/regional_policy/activity/tourism/index_en.cfm

Guidance for tourism-related investments 2014–20 under the European Structural and Investment Funds and, in particular, the European Regional Development Fund (ERDF):

http://ec.europa.eu/regional_policy/sources/docgener/informat/2014/guidance_tourism.pdf

Main statistical findings

Over the past six decades, despite occasional shocks, tourism has experienced almost uninterrupted expansion and diversification, becoming one of the largest and fastest-growing economic sectors in the world. This pattern continued in recent years, despite the global financial and economic crisis, with tourism having the potential to be one of the main engines of recovery in the EU.

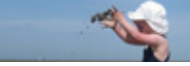
According to the **United Nations World Tourism Organisation**, in 2012 — for the first time in history — there were in excess of one billion international tourist arrivals. Europe remained the most frequently visited region in the world, accounting for over half of all international tourist arrivals in 2012. The wealth of European cultures, the variety of its landscapes and the quality of its tourist infrastructure are likely to be amongst the reasons why tourists choose to take their holidays in Europe.

Number of overnight stays

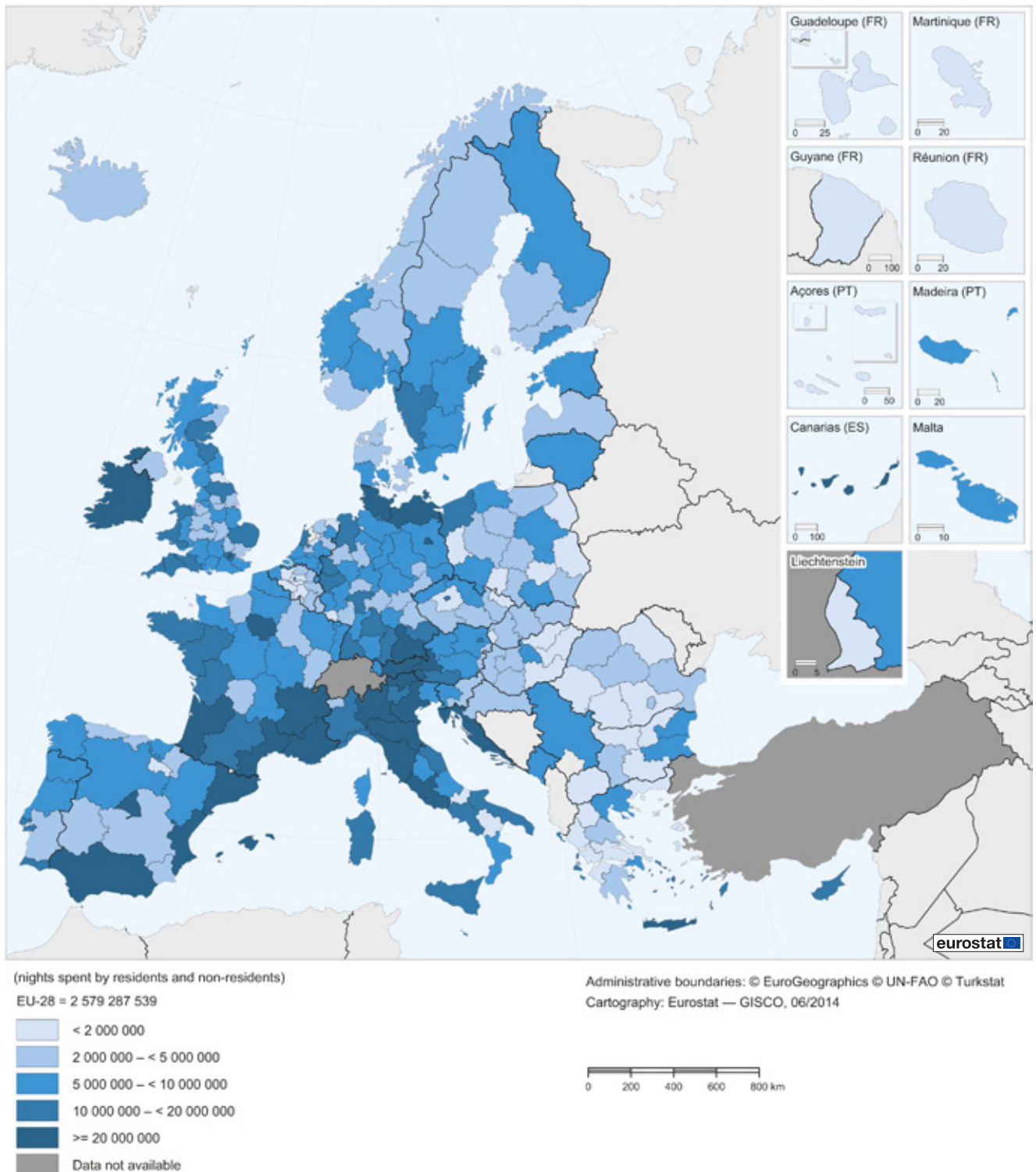
The number of **overnight stays**, which reflects both the length of stay and the number of visitors, is considered a key indicator within tourism accommodation statistics. There were 2.58 billion nights spent in tourist accommodation establishments (made up of **hotels and similar accommodation (NACE Group 55.1)**, **holiday and other short-stay accommodation (NACE Group 55.2)**, and **camping grounds, recreational vehicle parks and trailer parks (NACE Group 55.3)**) across the EU-28 in 2012.

Domestic EU tourists spent 1.45 billion nights in tourist accommodation establishments in 2012; this equated to 56.1 % of the total, with the number of overnight stays by non-residents reaching 1.13 billion.

Map 9.1 provides a regional breakdown of the total number of overnight stays (residents and non-residents combined) in tourist accommodation establishments in 2012. The map shows that tourism in the EU is often concentrated in coastal regions, although the Alpine regions and some cities also experienced high demand.



Map 9.1: Total nights spent in tourist accommodation establishments, by NUTS 2 regions, 2012 ⁽¹⁾
(nights spent by residents and non-residents)



⁽¹⁾ Steiermark (AT22) and the former Yugoslav Republic of Macedonia: 2011. Ireland: national level. Ireland: estimate.
Source: Eurostat (online data code: [tour_occ_nin2](#))

A total of 27 regions in the EU (including Ireland for which no regional analysis is available) recorded more than 20 million nights spent in tourist accommodation establishments (as shown by the darkest shade in **Map 9.1**). This list included six regions in each of Spain and Italy, five in France, four in Germany, two in Austria and one each in Greece, Croatia and the United Kingdom; note that Ireland as a whole recorded 28.9 million overnight stays.

Number of popular tourist destinations among non-residents was relatively limited ...

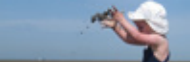
The results presented in **Map 9.1** may be contrasted with those shown for **Map 9.2**, where the analysis focuses on the relative share of non-residents in the total number of overnight stays in tourist accommodation establishments; the average across the whole of the EU-28 for this indicator was 43.9 % in 2012. There were only 65 NUTS 2 regions where the share of non-residents was above the EU-28 average, suggesting that foreign tourists had a relatively restricted range of destinations, while other regions may principally be destinations for national travellers. The highest share for non-residents in the total number of tourist nights spent was recorded in the Mediterranean island of Malta (a single region at this level of analysis); non-residents accounted for 95.7 % of the total nights spent in this region in 2012. There were eight other regions where the share of non-residents was at least 90.0 %, including the island destinations of Kriti and Notio Aigaiio (Greece), Jadranska Hrvatska (Croatia), Cyprus (also one region at the level of detail) and the Illes Balears (Spain). The remaining three regions included Luxembourg (a single region at this level of analysis), Praha (the capital region of the Czech Republic) and Tirol (in the Austrian Alps). Note that residents of Malta, Cyprus and Luxembourg may be less likely to spend their holidays in the domestic market given the relative size of these countries.

... although foreign visitors often visited capital regions more than domestic tourists

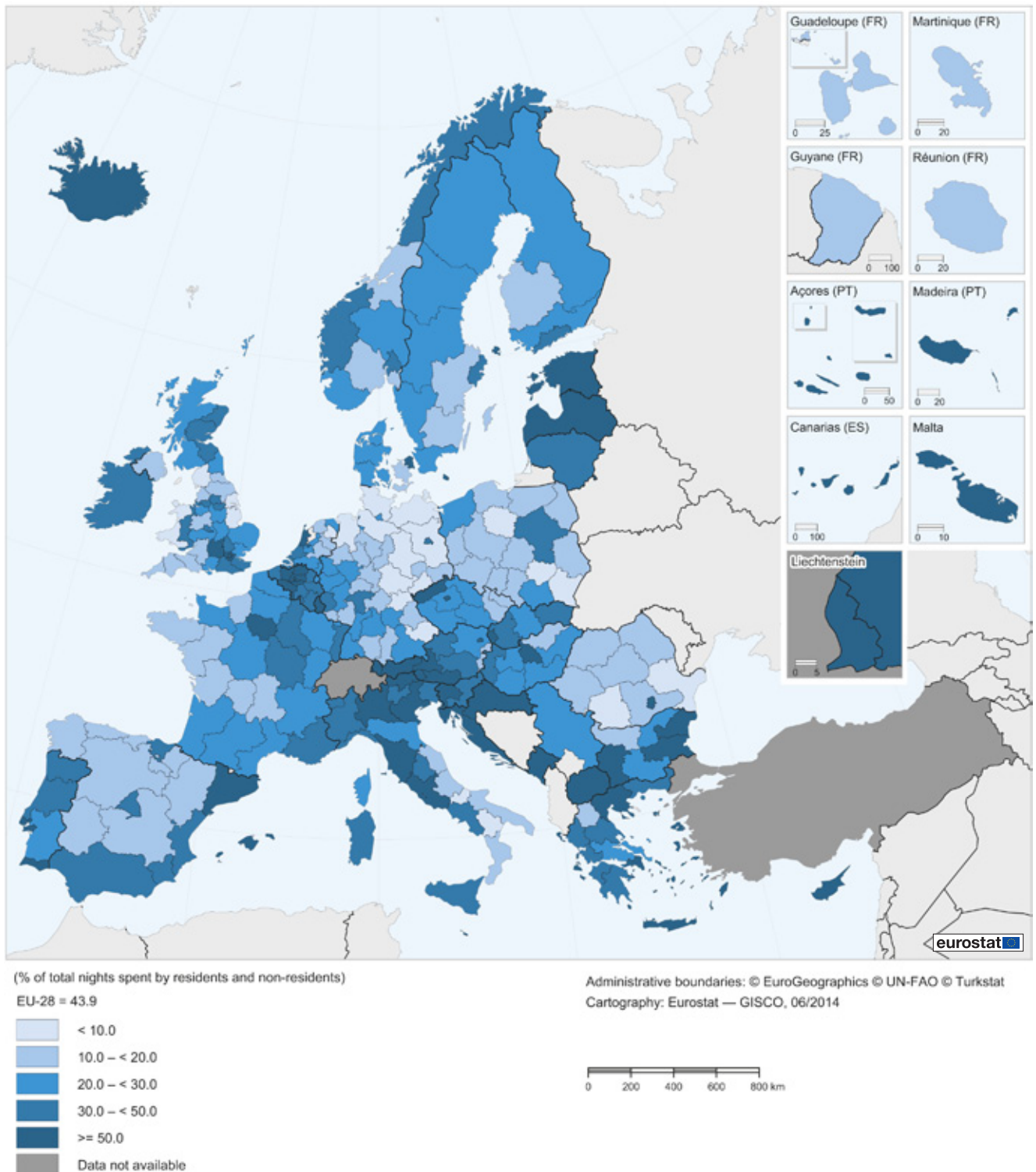
Among the multi-regional EU Member States, overnight stays by foreign visitors in capital regions generally accounted for a majority of the total nights spent in tourist accommodation establishments — the only exceptions in 2012 were in the capital regions of Germany, Spain, Poland, Finland and Sweden; a regional breakdown is not available for Ireland.

Mecklenburg-Vorpommern and Cumbria were examples of popular tourist regions which principally appealed to the domestic market

At the other end of the range, there were 22 NUTS 2 regions where fewer than 10 % of the total nights spent in tourist accommodation establishments were taken by non-nationals (as shown by the lightest shade in **Map 9.2**). Among these regions with relatively low levels of ‘international appeal’ there were 10 regions from Germany, four from the United Kingdom, three from Poland, two each from Italy and Romania and a single region from the Netherlands. Note that the information presented refers to the relative share of total nights spent and does not provide any indication as to the total number of nights spent; generally though the total nights spent in these regions were relatively low. However, there were a few regions which are characterised as having high ‘domestic appeal’ — for example, the sparsely populated Baltic coastal region of Mecklenburg-Vorpommern in Germany or Cumbria which includes the Lake District in the United Kingdom. A total of 24.8 million nights were spent in tourist accommodation establishments in Mecklenburg-Vorpommern in 2012 which was the 22nd highest value across the EU, just behind the whole of Ireland: non-nationals accounted for just 3.7 % of the Mecklenburg-Vorpommern total.



Map 9.2: Non-resident nights spent in tourist accommodation establishments, by NUTS 2 regions, 2012 ⁽¹⁾
(% of total nights spent by residents and non-residents)



⁽¹⁾ Steiermark (AT22) and the former Yugoslav Republic of Macedonia: 2011. Ireland: national level. Ireland: estimate.
Source: Eurostat (online data code: [tour_occ_nin2](#))

Most popular tourist regions

The top 20 tourist regions (in terms of nights spent by residents and non-residents) are shown in **Figure 9.1**; the analysis presents an analysis according to type of accommodation. These 20 regions together accounted for more than one third (37.4 %) of the total number of nights spent in the EU-28 in 2012.

Spanish islands of the Canarias had the highest number of overnight stays in 2012

The Spanish island region of the Canarias (87.5 million nights) had the highest number of overnight stays among any of the NUTS 2 regions in the EU in 2012, while two further Spanish regions also featured among the top five destinations — Cataluña (69.7 million nights) and the Illes Balears (64.7 million nights). The top five destinations were completed by the French capital region of Île de France (78.1 million nights) and the Italian region of Veneto (62.4 million nights), where the cities of Padua, Venice and Verona are located.

Aside from regions situated in the large holiday destinations of Spain, France and Italy, the top 20 regions also featured Jadranska Hrvatska (Croatia; 6th place), Inner London (the United Kingdom; 10th place), Tirol (Austria; 14th place) and Oberbayern (Germany; 17th place). The total number of nights spent on the Croatian Adriatic coast and islands of Jadranska Hrvatska reached 59.9 million in 2012. This marked the most successful year ever for Croatia as a tourist destination and coincided with preparations for Croatia’s accession to the EU.



SPOTLIGHT ON THE REGIONS: JADRANSKA HRVATSKA (HR03), CROATIA



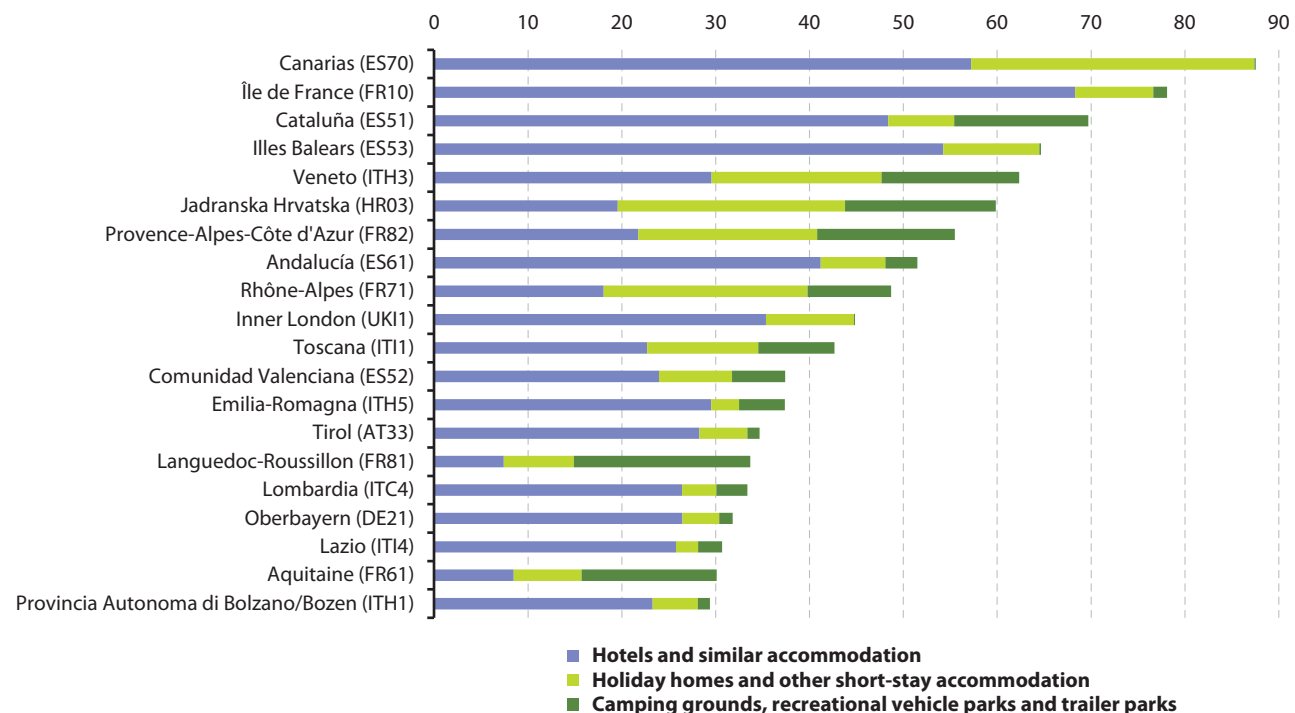
Dubrovnik, Croatia

Dubrovnik is a city in the south of Croatia on the Adriatic coast; it is part of the Jadranska Hrvatska region which also includes, among others, the popular tourist destinations of Split and Zadar on the mainland, as well as the islands of Hvar and Korčula.

Jadranska Hrvatska was the sixth most popular tourist destination in the EU in 2012 with 59.9 million nights spent.

Photo: Edward Wexler

Figure 9.1: Top 20 EU tourist regions, number of nights spent in tourist accommodation establishments, by NUTS 2 regions, 2012 ⁽¹⁾
(million nights spent by residents and non-residents)



⁽¹⁾ Ireland, Região Autónoma dos Açores (PT20) and Região Autónoma da Madeira (PT30): not available.
Source: Eurostat (online data code: [tour_occ_nin2](#))

Hotels accounted for the highest share of nights spent in the majority of popular tourist destinations ...

Hotels and similar accommodation accounted for more than half of the total number of nights spent in tourist accommodation establishments in 14 of the 20 most popular tourist regions of the EU in 2012. The French capital region of Île de France and the four Spanish regions of the Canarias, the Illes Balears, Cataluña and Andalucía, were the only regions to record in excess of 40 million overnight stays in hotels and similar accommodation in 2012. Hotels and similar accommodation were also the most popular form of accommodation in Veneto and the French region of Provence-Alpes-Côte d'Azur, although their share in the total number of overnight stays was below 50 % in both of these regions.

The French capital region recorded the highest proportion of nights spent in hotels and similar accommodation (87.4 % of all overnight stays). This could be contrasted with another French region, Languedoc-Roussillon (which borders onto the Mediterranean Sea), where the relative share of hotels and similar accommodation was just 22.1 %, which was the lowest share across the top 20 regions.

... although in Aquitaine and Languedoc-Roussillon the highest number of nights spent by tourists were in campsites

By contrast, Languedoc-Roussillon was the only region among the top 20 to report that more than half of its total number of overnight stays were spent in camping grounds, recreational vehicle parks and trailer parks (hereafter referred to as campsites); the only other NUTS 2 regions where campsites accounted for a majority of overnight stays were Midtjylland, Syddanmark (both Denmark), Lincolnshire and East Yorkshire and Northern Lincolnshire (both in the United Kingdom).

Aquitaine (another French region on the Atlantic coast) was the only other region among the top 20 to record its highest number (but not a majority) of overnight stays in campsites. In absolute terms, Aquitaine and Languedoc-Roussillon were also among the most popular destinations for camping, as they formed part of a group of six regions, together with Jadranska Hrvatska, Veneto, Provence-Alpes-Côte d'Azur and Cataluña, where the total number of overnight stays in campsites was above 14 million. Together these six regions accounted for 25.9 % of all nights spent in campsites across the EU-28 in 2012.

Holiday homes and other short-stay accommodation was popular in Rhône-Alpes and Jadranska Hrvatska

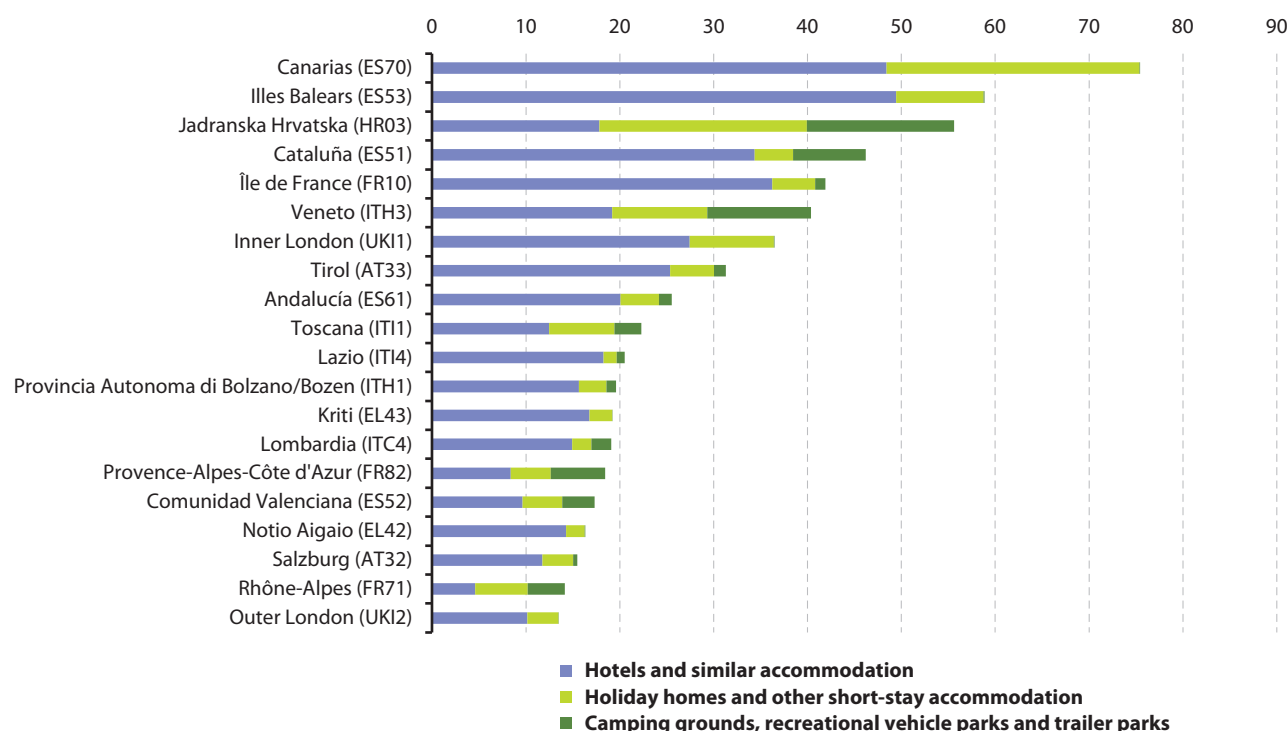
The most popular regions for holiday homes and other short-stay accommodation (among those in the top 20 tourist destinations) were the Canarias (30.2 million nights spent), Jadranska Hrvatska (24.2 million) and the south-eastern French region of Rhône-Alpes (21.7 million). The relatively high figure for the latter may, at least in part, be explained by short-stay rental vacations during the winter skiing season and summer hiking seasons. The 21.7 million nights spent in holiday homes and other short-stay accommodation in Rhône-Alpes equated to 44.5 % of the total number of overnight stays in this region in any form of tourist accommodation establishment, the highest share among the 20 most popular tourist destinations in the EU. The Croatian region of Jadranska Hrvatska was the only other region in the top 20 to report that holiday homes and other short-stay accommodation was its most popular form of accommodation (40.4 % of total nights spent).

Figure 9.2 shows similar information to that presented in **Figure 9.1**, but in this case the data refer only to overnight stays by foreign (non-resident) tourists; note these figures include people travelling from one EU Member State to another. The top 20 tourist regions for non-resident tourists in 2012 accounted for more than half (53.7 %) of all overnight stays by non-residents across the whole of the EU-28. The list of the most visited regions by foreign tourists includes regions in seven different EU Member States: Spain, Italy, France, Greece, Austria, the United Kingdom and Croatia: half of the 20 regions were either Spanish or Italian (five regions each).

Foreign tourists attracted by the beaches and coastal towns of Spain

The most popular destinations for foreign tourists included the three Spanish regions of the Canarias, the Illes Balears and Cataluña, along with Jadranska Hrvatska, the Île de France and Veneto. These were the only regions to report in excess of 40 million nights spent by foreign tourists in 2012 (whatever the type of accommodation). Together they accounted for 28.1 % of the overnight stays made by foreign tourists in the EU-28.

Figure 9.2: Top 20 EU tourist regions for non-residents, number of nights spent in tourist accommodation establishments, by NUTS 2 regions, 2012 ⁽¹⁾
(million nights spent by non-residents)



⁽¹⁾ Ireland, Região Autónoma dos Açores (PT20) and Região Autónoma da Madeira (PT30): not available.

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

Foreign tourists had a higher propensity to choose hotels as their preferred form of tourist accommodation

A majority of the overnight stays in 16 of the top 20 destinations for foreign visitors were spent in hotels and similar accommodation; this type of accommodation accounted for at least 80 % of the nights spent by foreign visitors in Lazio (which includes the Italian capital of Rome), the Greek island regions of Notio Aigaio and Kriti, the Île de France, the Illes Balears and Tirol.

Almost one third (31.6 %) of overnight stays by foreign visitors in 2012 in Provence-Alpes-Côte d'Azur were spent in campsites; this was the highest relative share of nights spent by foreign visitors in campsites among the 20 most popular tourist destinations. As such, foreign visitors appeared to have a lower propensity to make use of campsites than domestic tourists.

Table 9.1 shows by country, separately for residents and non-residents, which regions had the most number of overnight stays in tourist accommodation establishments in 2012. As already seen, many tourists have a preference for visiting regions with a coastline. This is, by definition, the case for the 10 EU Member States which are characterised by all of their NUTS 2 regions having a coastline. By contrast, there are five EU Member States that are completely landlocked.

Foreign visitors principally attracted to coastal destination in southern Europe and capital regions in more northerly Member States

Of the remaining 13 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 Yugoiztochen (Bulgaria), the Adriatic coastline and islands of Jadranska Hrvatska, and the north-western coastal region of Zachodniopomorskie (Poland). Among residents, the most popular region had a coastline in 11 of the 13 remaining Member States, the exceptions being in the Netherlands and Slovenia. Among non-residents, the situation was slightly more balanced, as the capital regions of Belgium, Germany, France, Romania and the United Kingdom attracted more foreign visitors than any other region (including those with a coastline); however, in the southern Member States the most popular regions for foreign visitors were also coastal areas.

Among the 10 EU Member States where all NUTS 2 regions have a coastline, there were only five countries with more than one region (and among these, there is no regional breakdown available for Ireland). Within the remaining four countries there was again a north-south divide, insofar as foreign visitors were most likely to visit the capital regions of Denmark, Finland and Sweden, while in Portugal the most popular destination for non-residents was the Algarve.

Among the four landlocked EU Member States with more than one region (therefore excluding Luxembourg), the most popular regions for foreign visitors were also capital regions in the Czech Republic, Hungary and Slovakia, whereas foreigners spent a higher number of nights in the

Tirol compared with the Austrian capital region of Wien; this may, at least in part, be due to winter skiing or summer hiking holidays often lasting a week or more, whereas tourist trips to cities are often shorter (for business meetings or for a weekend).

Table 9.1: Most popular tourist regions, number of nights spent in tourist accommodation establishments, by NUTS 2 regions, 2012 ⁽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	18.4	Syddanmark (DK03)	30.7	9.6	Hovedstaden (DK01)	48.9
Estonia	1.7		-	3.8		-
Ireland	17.0		-	11.8		-
Cyprus	1.1		-	13.5		-
Latvia	1.1		-	2.4		-
Lithuania	2.6		-	2.6		-
Malta	0.3		-	7.5		-
Portugal	17.7	Algarve (PT15)	24.7	29.0	Algarve (PT15)	40.1
Finland	14.5	Pohjois- ja Itä-Suomi (FI1D)	37.1	5.8	Helsinki-Uusimaa (FI1B)	41.2
Sweden	37.3	Västsverige (SE23)	21.4	11.3	Stockholm (SE11)	31.2
Iceland	0.8		-	2.9		-
Montenegro	1.0		-	8.1		-
Countries with coastal and non-coastal regions						
Belgium	14.8	Province/Provincie West-Vlaanderen (BE25)	30.3	16.6	Région de Bruxelles-Capitale/ Brussels Hoofdstedelijk Gewest (BE10)	28.9
Bulgaria	6.8	Yugoiztochen (BG34)	24.5	13.5	Yugoiztochen (BG34)	45.5
Germany	282.2	Mecklenburg-Vorpommern (DE80)	8.5	68.2	Berlin (DE30)	15.5
Greece	17.4	Kentriki Makedonia (EL12)	17.0	60.8	Kriti (EL43)	31.6
Spain	139.3	Andalucía (ES61)	18.6	243.4	Canarias (ES70)	31.0
France	275.5	Provence-Alpes-Côte d'Azur (FR82)	13.4	125.0	Île de France (FR10)	33.5
Croatia	5.1	Jadranska Hrvatska (HR03)	83.2	57.1	Jadranska Hrvatska (HR03)	97.4
Italy	200.1	Emilia-Romagna (IT15)	13.9	180.6	Veneto (IT13)	22.4
Netherlands	56.2	Gelderland (NL22)	14.5	27.8	Noord-Holland (NL32)	44.4
Poland	50.1	Zachodniopomorskie (PL42)	16.8	11.9	Zachodniopomorskie (PL42)	21.2
Romania	15.8	Sud-Est (RO22)	26.2	3.3	București - Ilfov (RO32)	37.2
Slovenia	3.7	Vzhodna Slovenija (SI01)	58.2	5.7	Zahodna Slovenija (SI02)	66.4
United Kingdom	198.1	West Wales & The Valleys (UK11)	8.1	105.5	Inner London (UK11)	34.6
Norway	22.0	Sør-Østlandet (NO03)	19.9	7.9	Vestlandet (NO05)	24.8
Landlocked countries						
Czech Republic	19.0	Severovýchod (CZ05)	25.9	20.5	Praha (CZ01)	59.9
Luxembourg	0.2		-	2.2		-
Hungary	11.8	Nyugat-Dunántúl (HU22)	21.0	11.4	Közép-Magyarország (HU10)	59.2
Austria	32.4	Steiermark (AT22)	18.6	77.2	Tirol (AT33)	40.6
Slovakia	6.7	Stredné Slovensko (SK03)	37.1	4.0	Bratislavský kraj (SK01)	26.5
Liechtenstein	0.0		-	0.1		-
FYR of Macedonia	0.7		-	0.7		-
Serbia	4.6		-	1.8		-

⁽¹⁾ Steiermark (AT22) and the former Yugoslav Republic of Macedonia: 2011.

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

Tourism pressures

In a broad sense, uncontrolled tourism poses a number of threats to both natural areas and cities. Increasing numbers of tourists in urban areas can result in added congestion, higher pollution levels and potential damage to historical buildings, while in rural and coastal areas increasing numbers of tourists may lead to soil erosion, increased waste, discharges into the sea, the loss of natural habitats and pressure on endangered species. Tourism pressures may be measured using a range of indicators: **tourism intensity** is defined as the number of overnight stays in relation to the resident population. This also provides a more nuanced guide to the economic significance of tourism in a region than the absolute number of overnight stays and in this context may be used to analyse the sustainability of tourism.

Tourism intensity in the Illes Balears, Notio Aigaio and the Provincia Autonoma di Bolzano/Bozen was more than 10 times the EU average

Across the whole of the EU-28 in 2012, there was an average of 5 074 nights spent by tourists in tourist accommodation establishments per thousand inhabitants. Tourism intensity peaked in the Spanish region of Illes Balears (59 082 overnight stays per thousand inhabitants), the Greek region of Notio Aigaio (58 087 overnight stays per thousand inhabitants) and the Italian Provincia Autonoma di Bolzano/Bozen (57 448 overnight stays per thousand inhabitants); tourism intensity in each of these three regions was more than 10 times the EU average. **Map 9.3** shows the regional distribution of tourism intensity in 2012: there were 34 NUTS 2 regions with intensities of at least 10 000 nights spent per thousand inhabitants (as shown by the darkest shade in the map); each of these regions had a tourism intensity that was at least twice as high as the EU-28 average.

The highest tourism intensity rates were concentrated principally in popular coastal regions (often around the Mediterranean). Otherwise, a number of Alpine regions (for example, the Provincia Autonoma di Bolzano/Bozen, Tirol and Salzburg) also reported relatively high tourism intensity, which is perhaps not surprising given that some of these regions are characterised as having relatively low levels of population density. This pattern was also reproduced in more northerly regions, such as the majority of the regions in the **Nordic Member States** and the Highlands and Islands of Scotland, where population density was also particularly low; which was also the case in Iceland.

Regional tourism density peaked in Inner London

An alternative means of analysing tourism pressures is by studying the relationship between the total number of overnight stays and the area available to accommodate tourists, by means of a ratio per square kilometre (km²). **Map 9.4** presents regional tourism density which was concentrated across urban regions (which generally consist of a much smaller total area). There were 53 regions across the EU where tourism density was above 1 750 nights spent by tourists (residents and non-residents) per km²; these are shown as the darkest shade on the map. On the basis of this measure of tourism density, Inner London recorded by far the highest concentration of tourists in the EU-28 in 2012, with 136 705 nights spent by tourists per km² (see **Figure 9.3**); this was almost four times as high as the second ranked region, the Belgian capital of the Région de Bruxelles-Capitale / Brussels Hoofdstedelijk Gewest (37 133 nights spent by tourists per km²). There were 10 NUTS 2 regions across the EU-28 which recorded tourism density of at least 10 000 nights spent by tourists per km² in 2012. Aside from the two regions already mentioned, these included three additional capital regions — those for Austria, Germany and the Czech Republic — the urban regions of Hamburg and Outer London, and the popular island destinations of Malta, the Illes Balears and the Canarias.



SPOTLIGHT ON THE REGIONS: VENETO (ITH3), ITALY

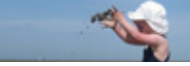


Grand canal, Venice

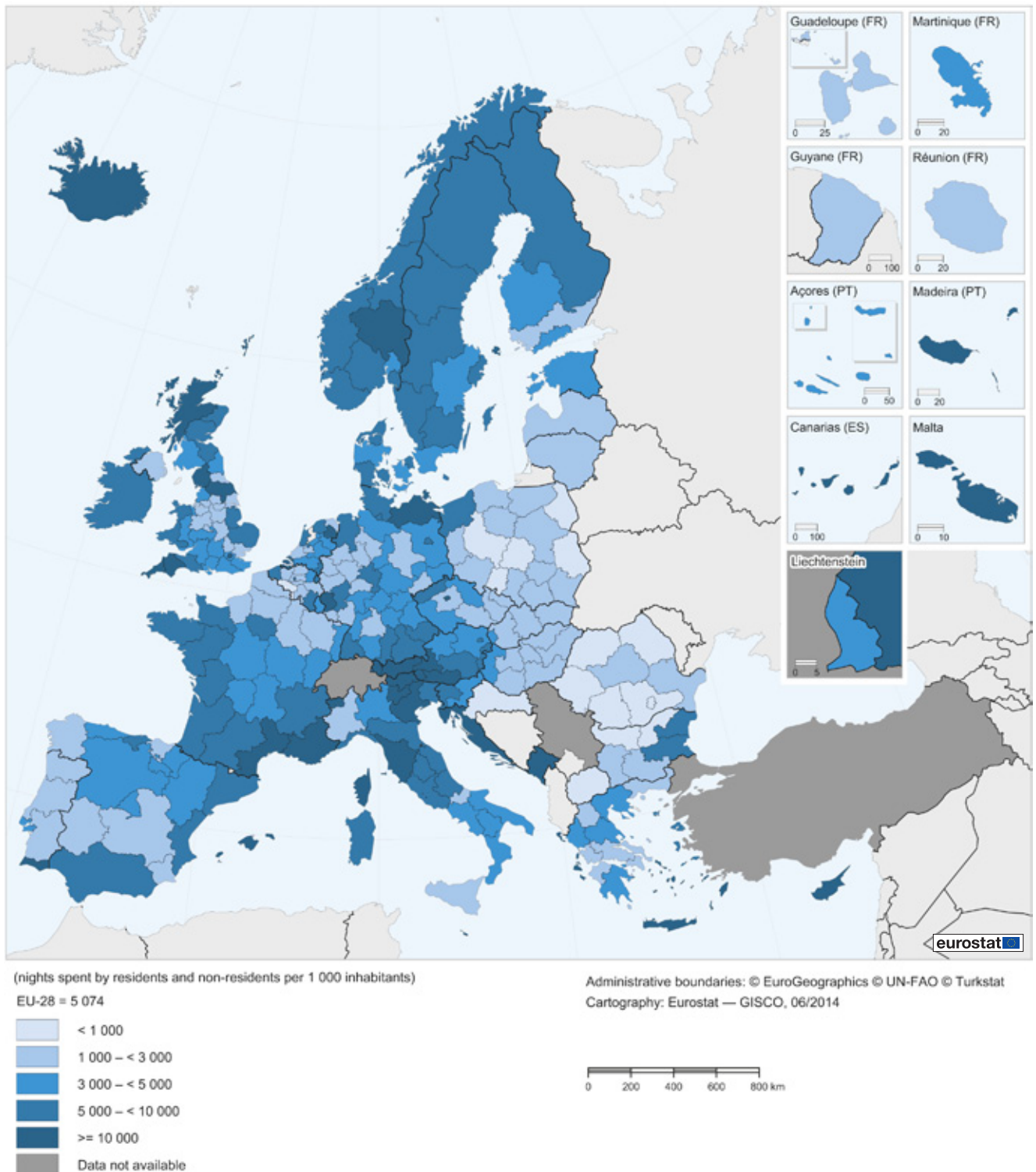
Venice and its lagoon are a UNESCO world heritage site that forms part of the Veneto NUTS 2 region in Italy. The popularity of Veneto as a tourist destination extends beyond Venice and includes the cities of Padua and Verona, the eastern shores of Lake Garda and a number of coastal resorts (for example, Lido di Jesolo and Caorle).

Veneto was one of the five most popular tourist regions in the EU in 2012 with 62.4 million nights spent in tourist accommodation establishments by resident Italians and non-residents. It was joined in the top 20 tourist destinations by five other Italian regions, namely: Toscana, Emilia-Romagna, Lombardia, Lazio and the Provincia Autonoma di Bolzano/Bozen.

Photo: Hans Peter Schaefer



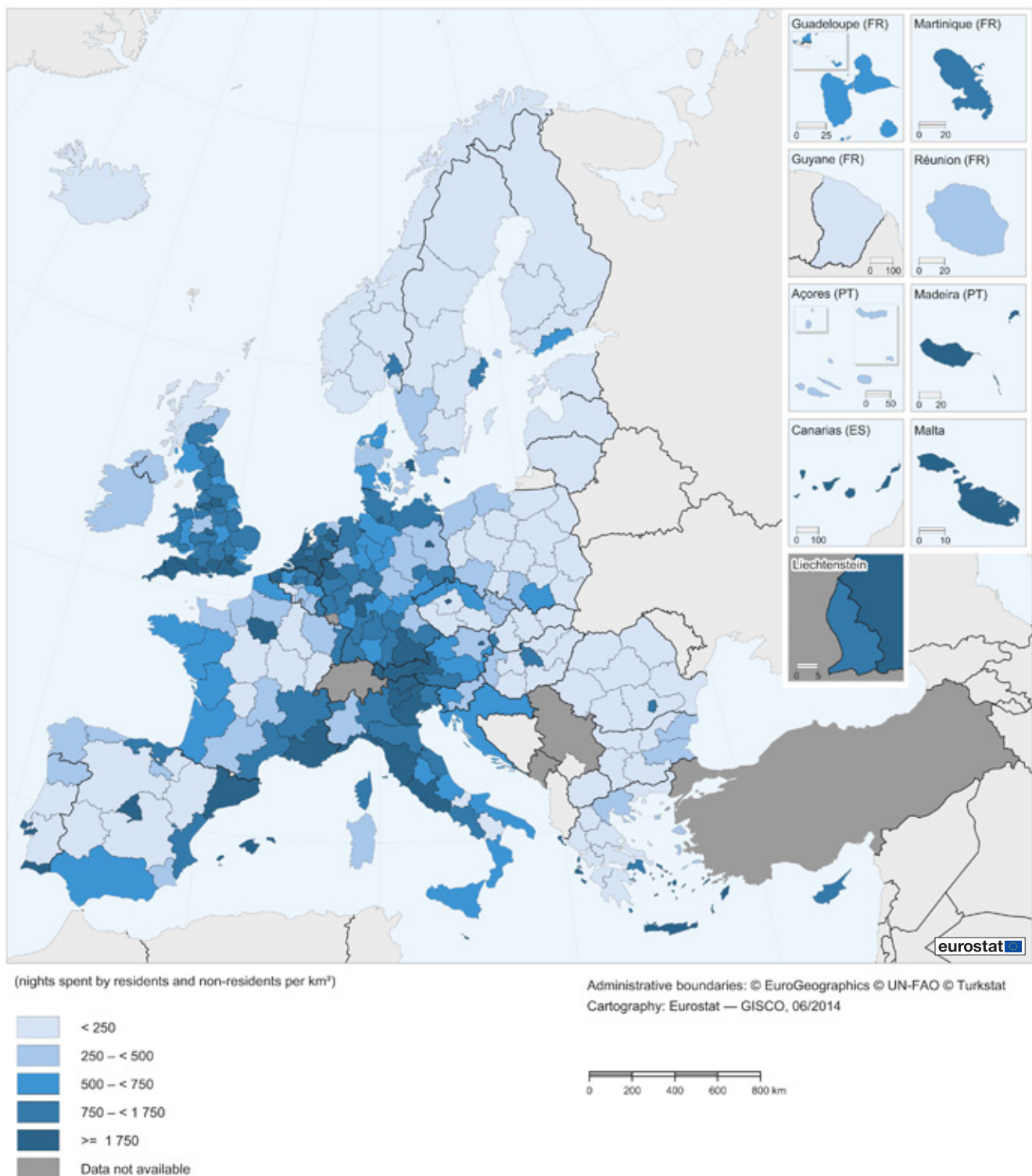
Map 9.3: Nights spent in tourist accommodation establishments, by NUTS 2 regions, 2012 ⁽¹⁾
(nights spent by residents and non-residents per 1 000 inhabitants)



⁽¹⁾ Steiermark (AT22) and the former Yugoslav Republic of Macedonia: 2011. Ireland: national level. Ireland: estimate.

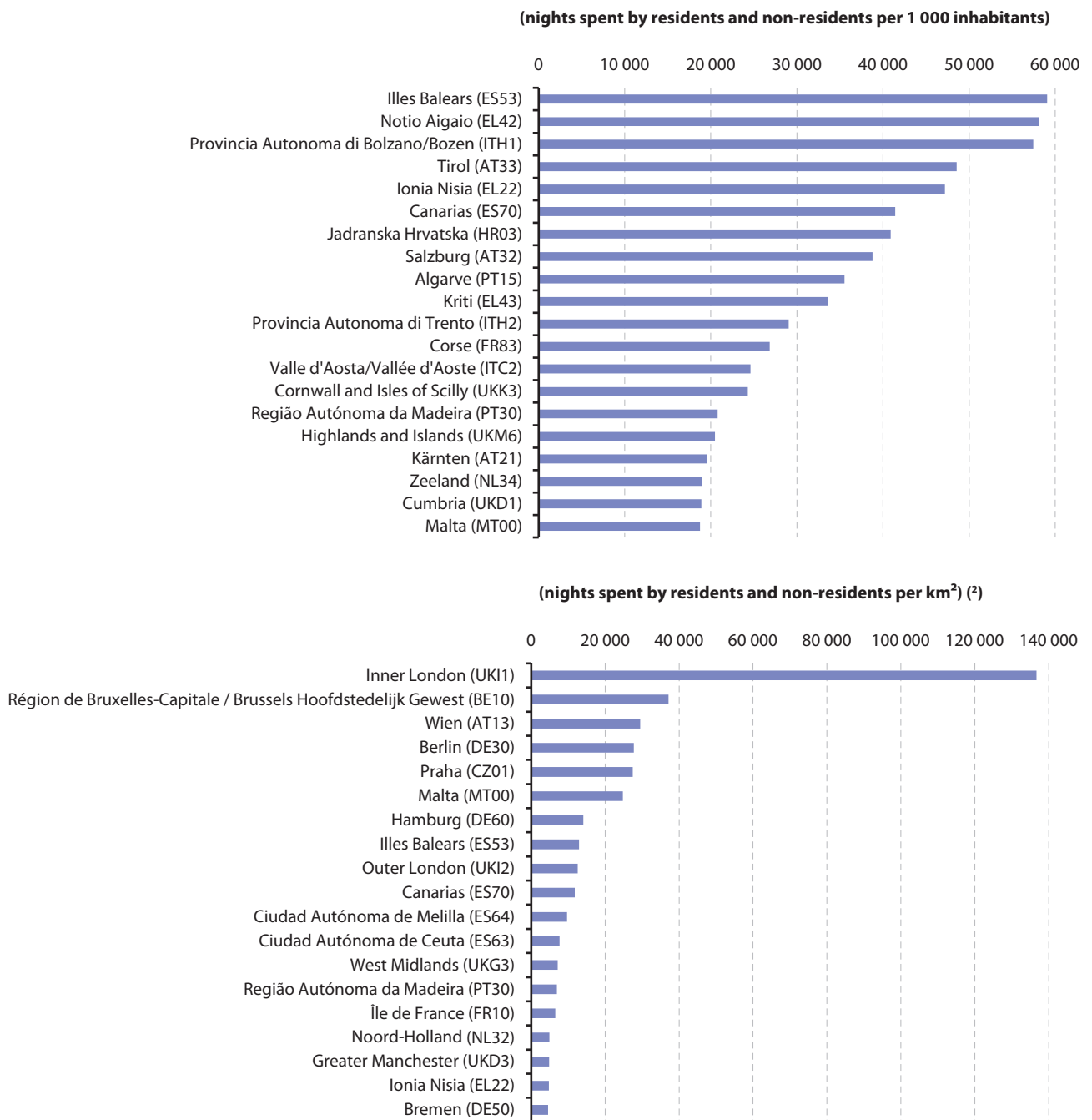
Source: Eurostat (online data code: [tour_occ_nin2](#))

Map 9.4: Nights spent in tourist accommodation establishments, by NUTS 2 regions, 2012 ⁽¹⁾
 (nights spent by residents and non-residents per km²)



⁽¹⁾ Steiermark (AT22) and the former Yugoslav Republic of Macedonia: 2011. Ireland and Croatia: national level. Ireland: estimate.
 Source: Eurostat (online data code: [tour_occ_nin2](#))

Figure 9.3: Top 20 EU tourist regions, number of nights spent in tourist accommodation establishments, by NUTS 2 regions, 2012 ⁽¹⁾



⁽¹⁾ Steiermark (AT22) and the former Yugoslav Republic of Macedonia: 2011. Ireland: national level. Ireland: estimates.

⁽²⁾ Croatia: national level.

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

Coastal, rural and urban tourism

With a change in the legal basis for the collection of tourism statistics (see Data sources and availability for more details), a new set of information has become available for statistics covering the reference year 2012 onwards. **Maps 9.5–9.7** present regional tourism statistics analysed according to whether or not tourist accommodation establishments are in coastal localities, densely or thinly populated areas; for each map the denominator is the total nights spent by residents and non-residents in the regions' tourist accommodation establishments.

Approximately 40 % of the EU's population lives within 50 km of the sea. Many coastal regions in Europe are characterised by considerable building activity as more of the population chooses to live near the sea and mass-market tourism continues to expand. Coastal regions are characterised by a range of economic activities, covering among others: shipping and ports, fisheries, energy and coastal tourism. Such activity can potentially have serious implications in relation to sustainable development: for example, natural habitats may be destroyed, species may be threatened, and pollution and erosion could increase. One particular aspect of climate change which makes coastal regions particularly vulnerable is the likelihood that sea levels will rise in the coming years.

Pull of coastal localities as tourist destinations

Map 9.5 shows, for NUTS 2 regions with a coastline, the proportion of total nights spent in tourist accommodation establishments in coastal localities. There were 16 regions across the EU-28 where coastal localities accounted for each and every night spent in tourist accommodation establishments. These covered a range of different regions: from largely urban regions such as Bremen or Hamburg in Germany, through traditional tourist destinations such as the islands of the Canarias and the Illes Balears, or Cyprus and Malta (single regions at this level of analysis), to less popular tourist destinations, Åland (in Finland) or East Yorkshire and Northern Lincolnshire (in the United Kingdom).

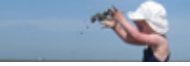
The pull of coastal localities can be seen by the skewed nature of the distribution of nights spent. Among the 119 NUTS 2 regions across the EU for which data are available in 2012 (no information for Ireland or Greece), almost four out of every five regions reported that coastal localities accounted for a majority of the nights that were spent in tourist accommodation establishments. At the other end of the range, there were 15 regions where coastal localities accounted for less than 35 % of the nights spent in tourist accommodation establishments (as shown by the lightest shade in **Map 9.5**). These were often regions that had relatively short coastlines and major inland cities, for example, Picardie in the north of France, the Noord Brabant region of the Netherlands, Warmińsko-Mazurskie in Poland, or Cheshire in the United Kingdom.

Unsurprisingly, all of the nights spent in tourist accommodation in the Belgian, Czech, German and British capital regions were spent in densely populated areas

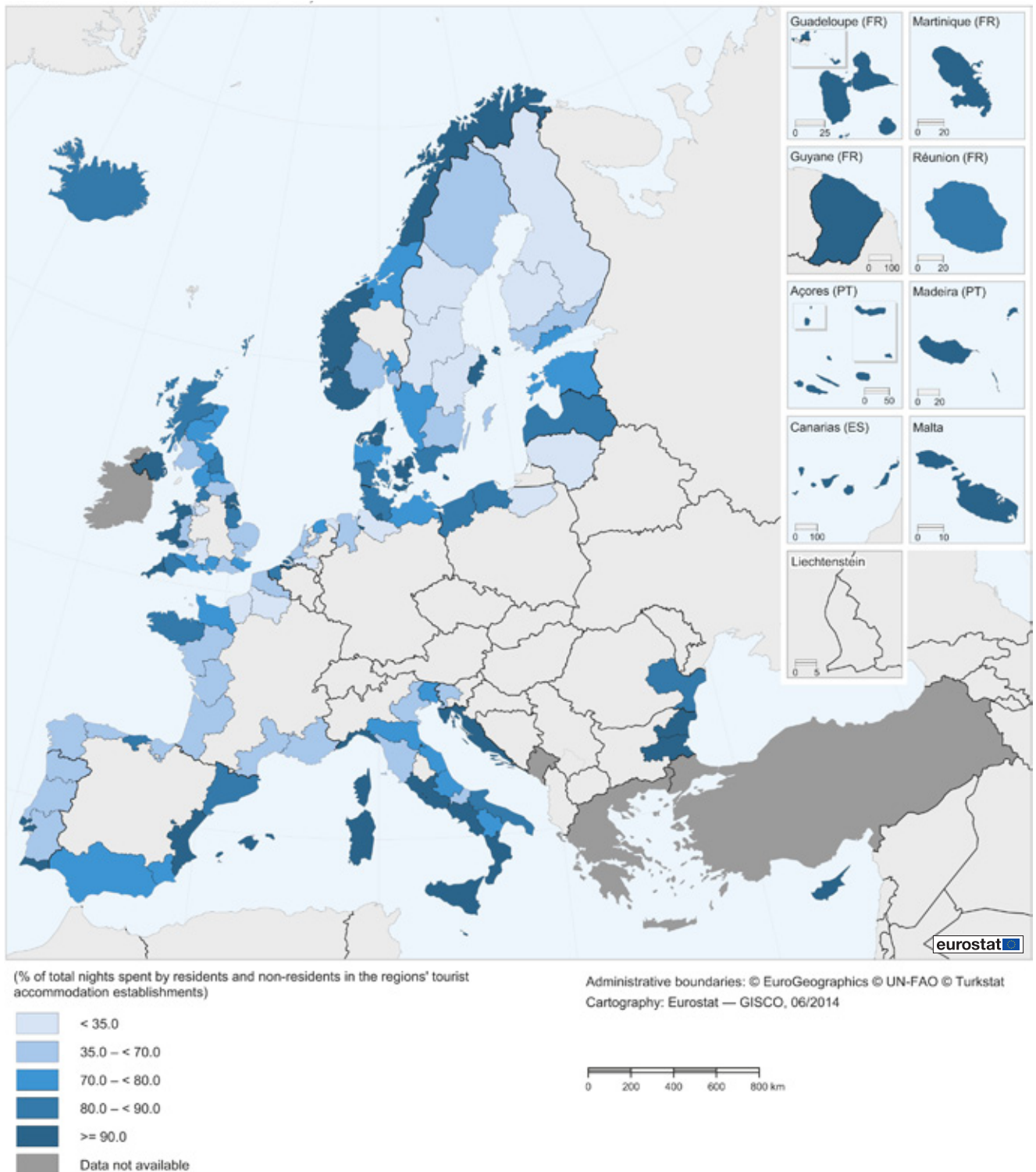
A similar type of analysis is presented in **Map 9.6**, which focuses on the share of urban tourism in the proportion of nights spent in tourist accommodation establishments. As may be expected the most popular destinations for urban tourism include capital regions and regions characterised by relatively large cities. There were 14 regions across the EU where densely populated areas accounted for all of the nights spent in tourist accommodation establishments in 2012, simply because all areas within the region are classified as densely populated; these included the capital regions of Belgium, the Czech Republic, Germany and the United Kingdom. By contrast, there were 13 regions across the EU-28 where urban tourism failed to account for any of the nights spent in tourist accommodation establishments.

Rural tourism dominates nights spent in Cumbria, Zeeland, the Highlands and Islands and Prov. Luxembourg

Map 9.7 provides further information on the regional distribution of the proportion of nights spent in thinly populated areas. In Cumbria (the United Kingdom) thinly populated areas accounted for a 96.9 % share of the total nights spent in the regions' tourist accommodation establishments. There were three other regions where this share was above 90 %, namely, in Zeeland (the Netherlands), the Highlands and Islands (of Scotland) and in the southern Belgian region of the Prov. Luxembourg.

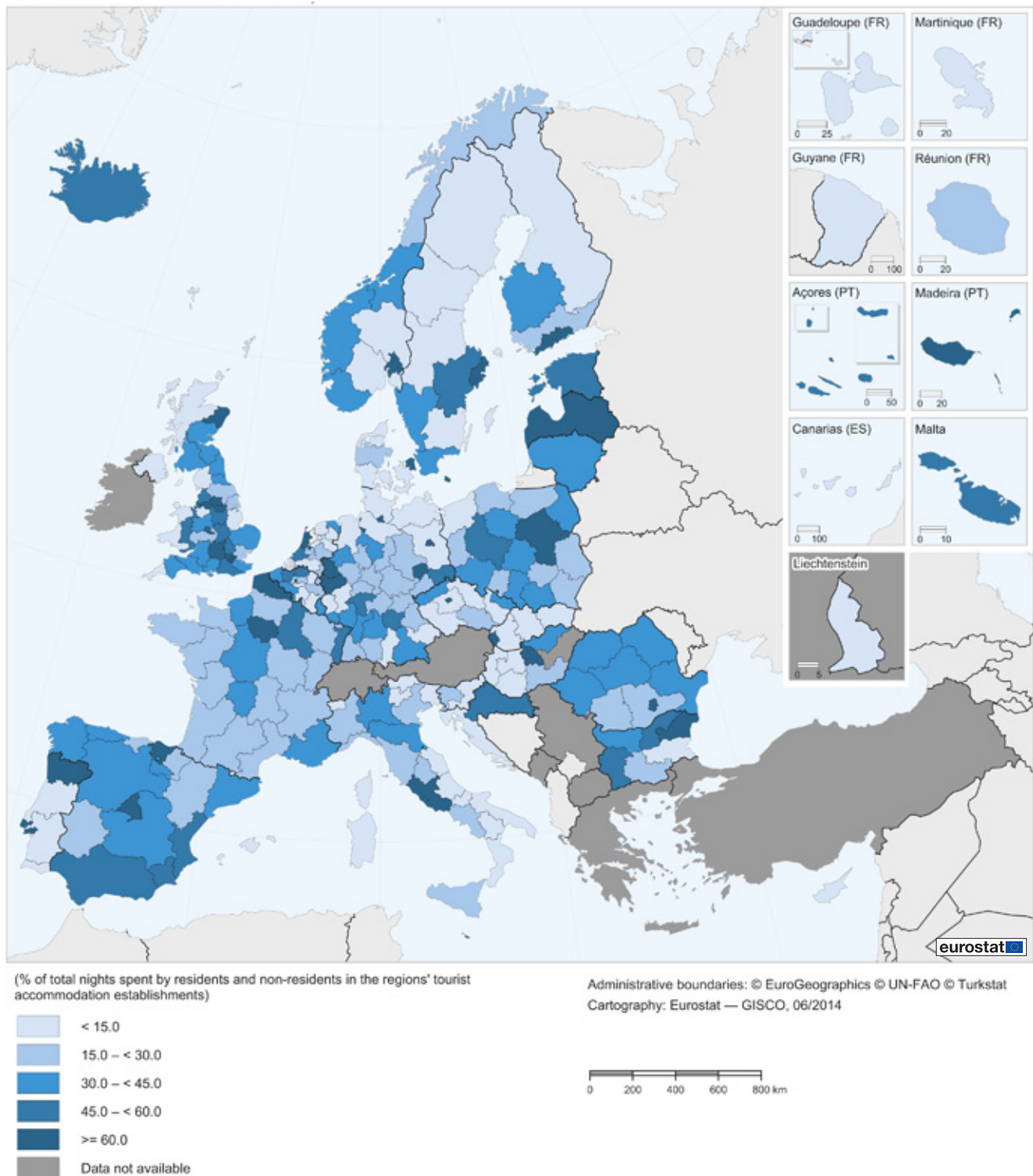


Map 9.5: Nights spent in tourist accommodation establishments in coastal localities, by NUTS 2 regions, 2012
(% of total nights spent by residents and non-residents in the regions' tourist accommodation establishments)

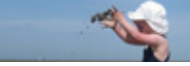


Source: Eurostat (online data code: [tour_occ_nin2c](#))

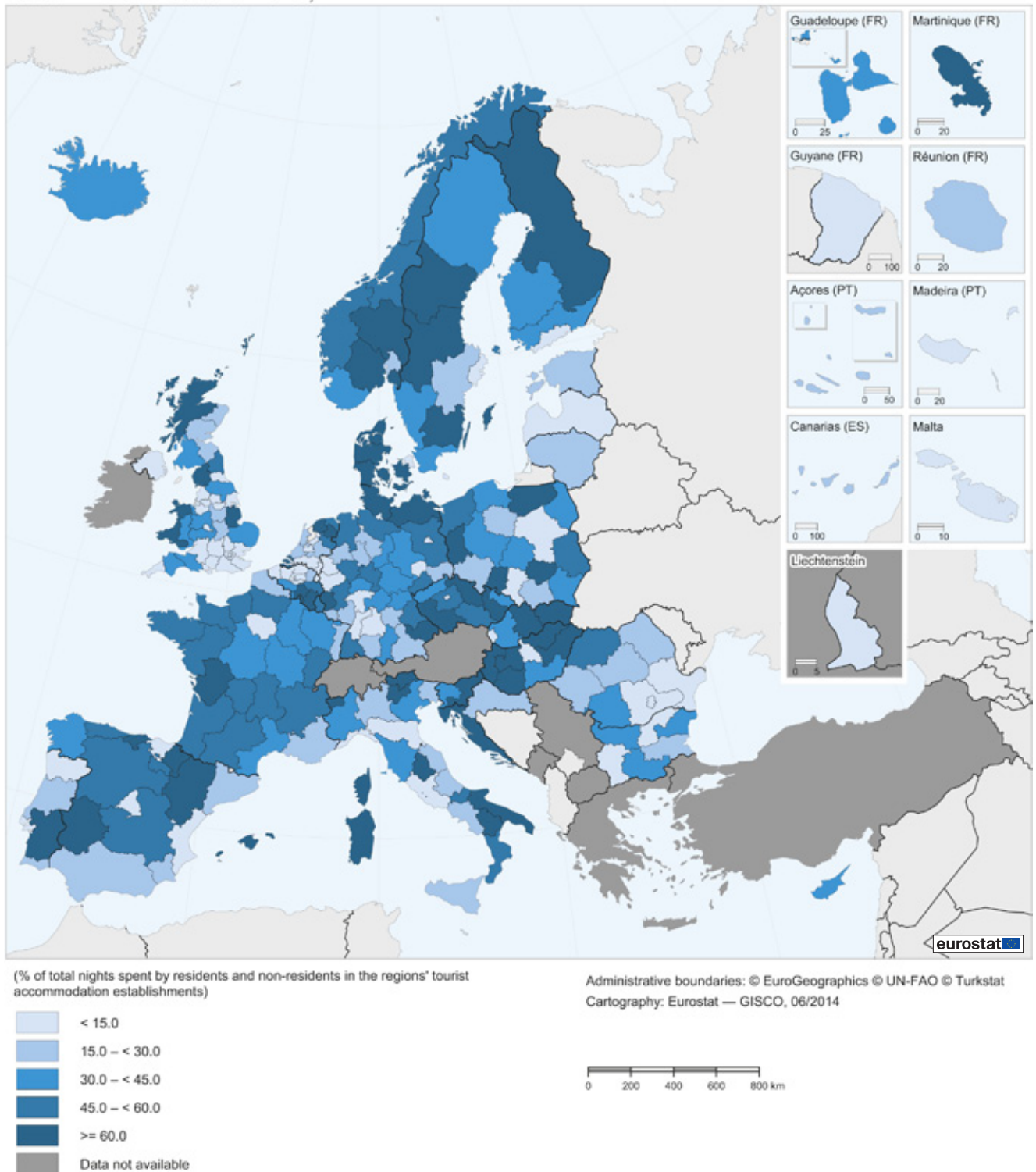
Map 9.6: Urban tourism — nights spent in tourist accommodation establishments in densely populated areas, by NUTS 2 regions, 2012
 (% of total nights spent by residents and non-residents in the regions' tourist accommodation establishments)



Source: Eurostat (online data code: [tour_occ_nin2d](#))



Map 9.7: Rural tourism — nights spent in tourist accommodation establishments in thinly populated areas, by NUTS 2 regions, 2012
(% of total nights spent by residents and non-residents in the regions' tourist accommodation establishments)



Source: Eurostat (online data code: [tour_occ_nin2d](#))

Accommodation capacity

There were an estimated 544 700 tourist accommodation establishments in the EU-28 in 2012 offering a total of almost 30 million bed places. Just over one third (36.8 %) of the total number of tourist accommodation establishments in the EU were hotels and similar establishments and they provided a total of 6.4 million bedrooms and 13.1 million bed places, equivalent to an average of 32 bedrooms and 65 bed places per hotel.

Map 9.8 provides a regional analysis of the total number of bed places in hotels and similar establishments. The darkest shade on the map covers those regions with at least 70 000 bed places; together these 47 NUTS 2 regions accounted for slightly more than half of the total number of bed places that were available in the EU-28 in 2012. Those regions with a high number of bed places were, unsurprisingly, often the same regions that recorded a high number of overnight stays and were mainly concentrated in coastal, mountainous and capital regions.

Illes Balears, Cataluña and Andalucía had highest supply of bed places

The highest number of bed places was recorded in the Illes Balears, followed by two other Spanish regions, Cataluña and Andalucía. With the addition of the Île de France and the Italian region of Emilia-Romagna (which has Adriatic resorts such as Rimini, the Apennine mountains and urban centres such as Bologna and Modena), these were the only five regions in the EU to record more than 300 000 bed places.

While a count of the total number of bed places is of interest in relation to the capacity of different regions to respond to tourism demand, those working within tourism are more likely to be interested in net occupancy rates, which go a step further and detail the take-up of bedrooms over the course of a year. Occupancy rates may be measured in relation to the number of rooms or the number of bed places; room rates are often considered the preferred measure insofar as the turnover of a double room is often the same irrespective of whether the room is occupied by one or two persons.

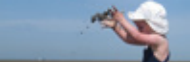
The occupancy of hotels and similar establishments may vary according to the characteristics of each region. Urban regions are more likely to be characterised by large numbers of visitors who tend to stay for a relatively short period of time, with tourist trips to cities often spread throughout the year. Visitors to these regions may also be travelling for professional reasons, in which case demand for rooms will probably be spread throughout the working week, supplemented by private trips during weekends and holiday periods. By contrast, the average length of stays is substantially longer in more traditional holiday regions which are visited chiefly for recreational purposes. Nevertheless, tourism demand for trips to these regions is often concentrated in the summer months (especially for those regions with coastlines), while there is a secondary peak in demand during the winter months, most apparent in Alpine regions.

Bedroom occupancy rates highest in London

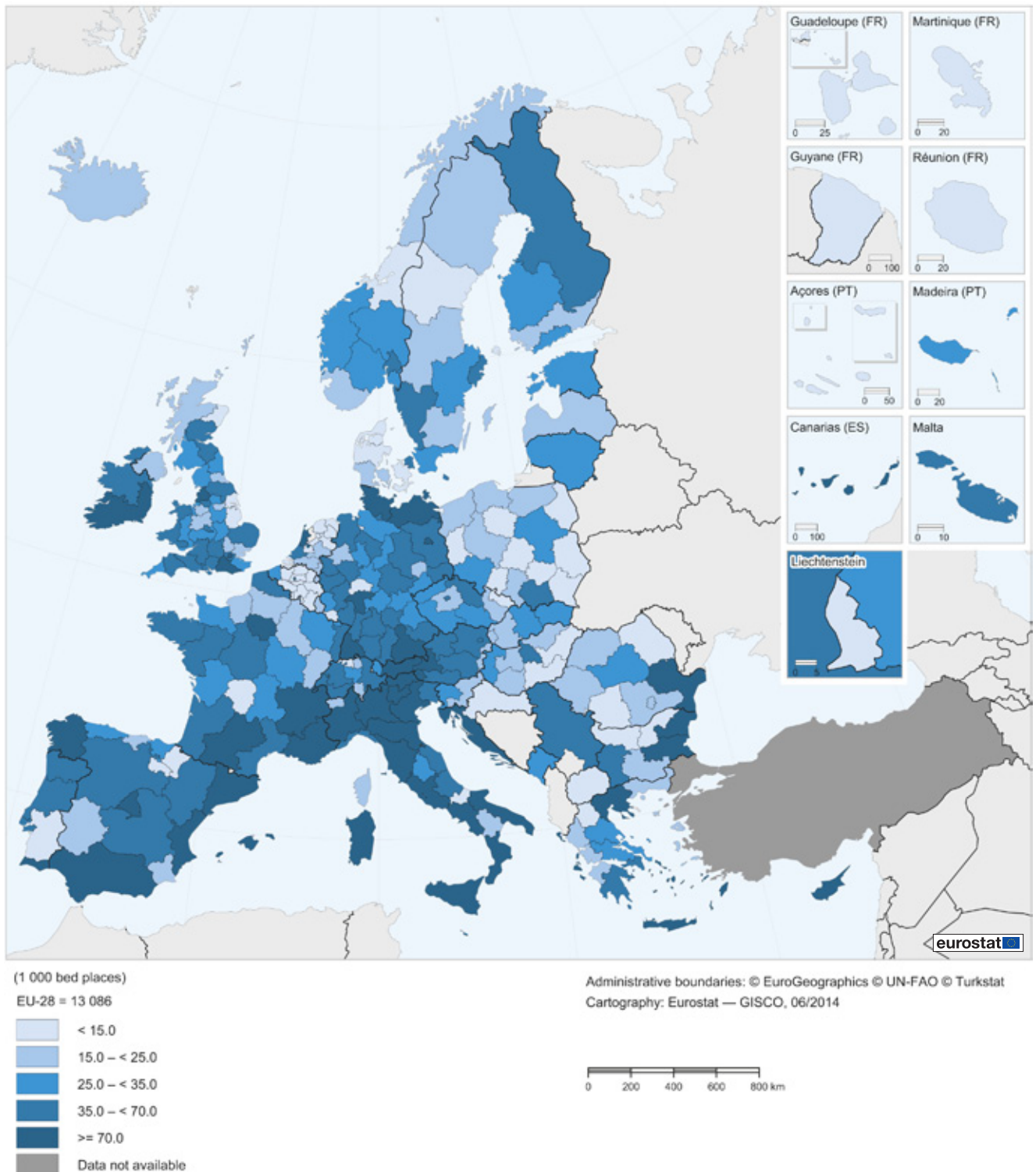
Map 9.9 provides a regional analysis of the occupancy rates for bedrooms in hotels and similar establishments in 2012; note that data for Ireland and the Netherlands are only available at the national level, while there is no information available for Croatia or Austria. The highest net occupancy rate was recorded in London, where 80.1 % of bedrooms were occupied during the course of 2012; note that the data available for the United Kingdom are only presented for NUTS 1 regions.

There were four other NUTS 2 regions with occupancy rates above 70 %: two of these were the capital regions of Île de France and Berlin, while the others were the Illes Balears and the Canarias; note that some hotels in these destinations may close during the off-season, while others seek to keep their occupancy rates high through special offers which may, for example, encourage pensioners (typically from northern Europe) to spend longer periods on vacation during the winter months.

There were 22 additional regions that recorded occupancy rates for bedrooms in hotels and similar establishments of at least 60.0 % in 2012 (as shown by the darkest shade in **Map 9.9**). These regions were often characterised as urban areas. Relatively few of them were among the most popular tourist destinations in the EU — the main exceptions being the Provincia Autonoma di Bolzano/Bozen, Cataluña, Cyprus, Malta and Oberbayern.

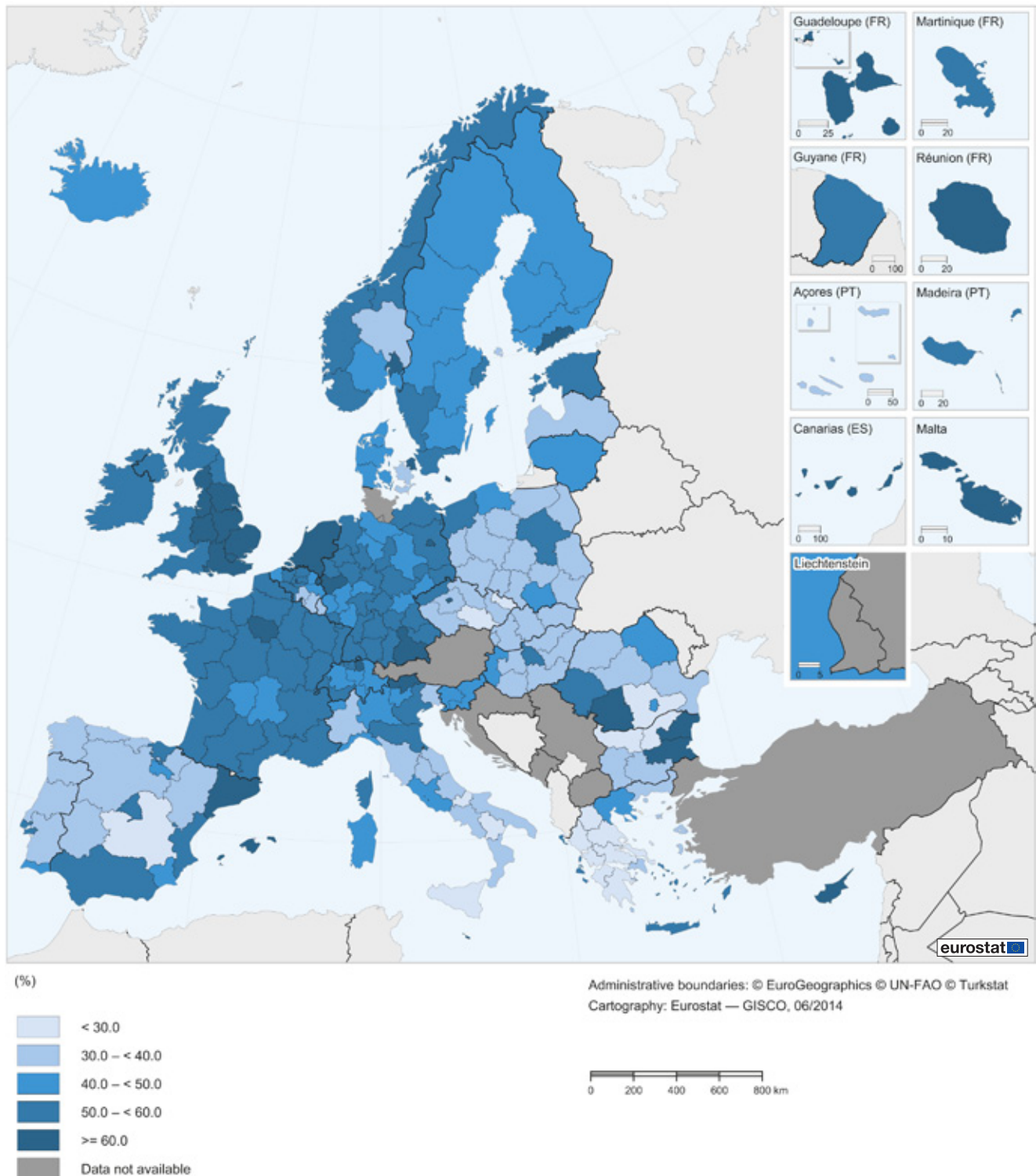


Map 9.8: Number of bed places in hotels and similar establishments, by NUTS 2 regions, 2012 ⁽¹⁾
(1 000 bed places)



⁽¹⁾ The former Yugoslav Republic of Macedonia: 2011. Lazio (IT14): estimate.
Source: Eurostat (online data code: [tour_cap_nuts2](#))

Map 9.9: Net occupancy rates for bedrooms in hotels and similar establishments, by NUTS 2 regions, 2012 ⁽¹⁾ (%)



⁽¹⁾ The United Kingdom: by NUTS 1 regions. Ireland and the Netherlands: national level. Ireland: estimate.
 Source: Eurostat (online data code: [tour_occ_anor2](#))

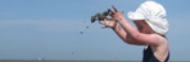
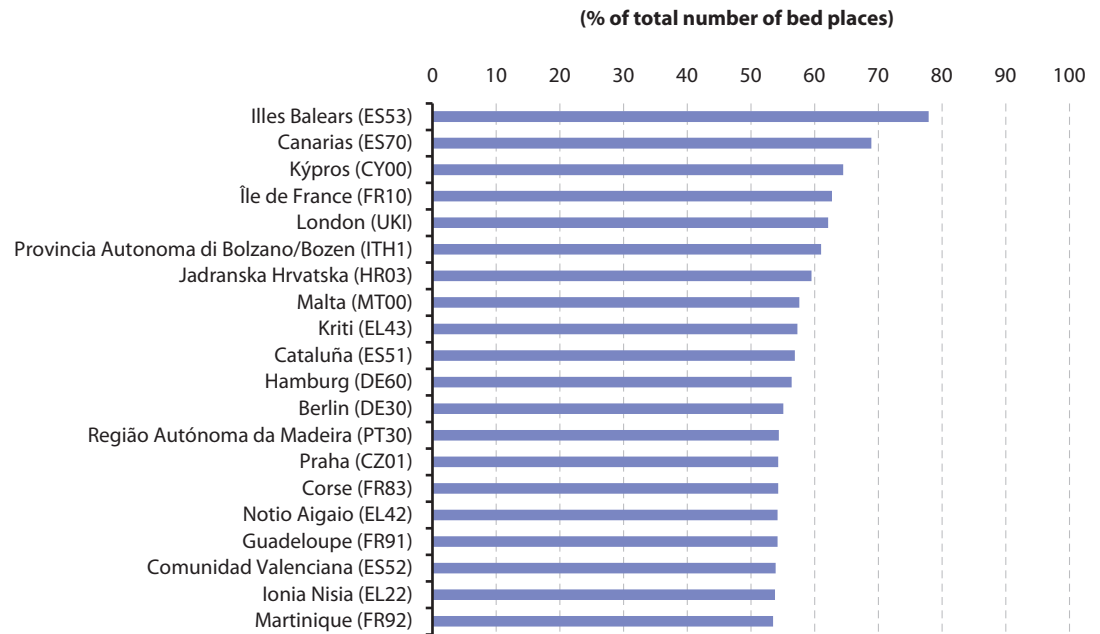


Figure 9.4: Top 20 EU tourist regions, by occupancy rates in hotels and similar establishments, by NUTS 2 regions, 2012 ⁽¹⁾



⁽¹⁾ The United Kingdom: by NUTS 1 regions. Ireland: national level. Ireland: estimates.

⁽²⁾ The Netherlands: national level. Hamburg (DE60), Schleswig-Holstein (DEF0), Croatia and Austria: not available.

Source: Eurostat (online data code: [tour_occ_anor2](#))

More than half of the regions in the EU had occupancy rates of less than 50.0 %

More than half of all the NUTS 2 regions reported occupancy rates of less than 50.0 % in 2012; this was the case for 118 out of the 222 regions for which data are available. At the bottom of the range, there were 15 NUTS 2 regions in the EU where bedroom occupancy rates in 2012 were below 30.0 % (the lightest shade in **Map 9.9**). Six of these regions were located in Greece — where it is likely that the continuing effects of the financial and economic crisis impacted upon both business and leisure demand — while there were regions from the south of Italy (including the popular holiday destination of Sicily), two regions each from Bulgaria and the Czech Republic and a single region each from Spain and Romania.

In the Illes Balears, occupancy rates for bed places peaked at 77.9 %

Figure 9.4 summarises the top 20 regions in the EU with the highest occupancy rates in hotels and similar establishments in 2012; information is shown in relation to bed places and bedrooms. Across the two parts of **Figure 9.4** there were nine regions which appeared in both rankings: the capital regions of Berlin, Île de France and London (NUTS 1), the coastal regions of the Canarias, Guadeloupe, the Illes Balears, Cyprus and Malta (the latter two are both single regions at this level of analysis) and the Alpine region of Provincia Autonoma di Bolzano/Bozen.

Data sources and availability

Legal basis

There has been a major change in methodology with respect to regional tourism statistics. As of reference year 2012, the legal basis for the collection of regional tourism statistics is a Regulation of the European Parliament and of the Council concerning [European statistics on tourism](#) ((EU) 692/2011) and a European Commission [implementing regulation](#) ((EU) 1051/2011), which covers the transmission of data and the structure of accompanying quality reports. This legal basis requires EU Member States to provide a regular set of comparable tourism statistics: data are collected from all of the EU Member States, as well as from EFTA and candidate countries. European aggregates (for example, for the EU-28) are calculated / estimated when data of sufficient quality are available.

Regional tourism statistics are only available for the supply side; they are collected via surveys filled in by accommodation establishments. The information collected at a regional level covers accommodation capacity (establishments, room and bed places) and occupancy (number of arrivals and overnight stays).

Regional and sub-national breakdowns

Regulation (EU) 692/2011 foresees the collection of regional tourism statistics at the NUTS 2 level; tourism statistics are therefore no longer collected for regions at the NUTS 3 level (from 2012 onwards). The regulation also introduced two new analyses for sub-national statistics relating to accommodation statistics, namely, by degree of urbanisation (thinly populated areas, intermediate density areas, densely populated areas) and by coastal or non-coastal locality.

Coastal areas are defined on the basis of local area units or municipalities. They consist of municipalities that are bordering the sea or close to the sea. Coastal areas and non-coastal areas are classified according to the distance of the municipality to the sea: if a municipality borders the sea, it is by default coastal (and part of a coastal region); if a municipality is not bordering the sea but has 50 % of its surface within a distance of 10 km from the sea, it is also considered coastal; all other municipalities are non-coastal.

Statistical units and activity classification

A tourist accommodation establishment is a local kind-of-activity unit: this is irrespective of whether the accommodation of tourists is the main or a secondary activity. As such, for tourism statistics all establishments providing accommodation are classified in the accommodation sector, even if a major part of their turnover comes from restaurant / catering services or other services.

Tourist accommodation establishments are defined according to the activity classification, *NACE*. They are units providing, as a paid service, short-term or short-stay accommodation services. Tourism accommodation establishments are classified, as:

- NACE Group 55.1, hotels and similar accommodation (this includes accommodation provided by: hotels, resort hotels, suite / apartment hotels, motels);
- NACE Group 55.2, holiday and other short-stay accommodation (this includes children and other holiday homes, visitor flats and bungalows, cottages and cabins without housekeeping services, youth hostels and mountain refuges);
- NACE Group 55.3, camping grounds, recreational vehicle parks and trailer parks — otherwise referred to as campsites (this includes provision of accommodation in campgrounds, trailer parks, recreational camps and fishing and hunting camps for short stay visitors, provision of space and facilities for recreational vehicles, protective shelters or plain bivouac facilities for placing tents and/or sleeping bags).

Tourism accommodation establishments are sometimes referred to as rented accommodation. By contrast, non-rented accommodation is that provided without charge (for example, by family or friends) and accommodation in owner-occupied vacation homes, including timeshare properties.

Given that there are differences in the definitions of statistical units for tourist accommodation establishments between reference periods 2011 and 2012, there is the possibility of a break in series. As such, the regional information presented in this chapter is restricted to the latest reference period, 2012, and there is no time series analysis.

Residents and non-residents

Domestic tourism comprises the activities of residents of a given country travelling to and staying in their own country, but outside their usual environment; this information may be contrasted with similar information on foreign tourists (often referred to as non-residents).

A person is considered to be a resident in a country (place) if that person: has lived for most of the past year or 12 months in that country (place), or has lived in that country (place) for a shorter period and intends to return within 12 months to live in that country (place). Non-resident or international tourists are classified according to their country of residence, not their citizenship. Citizens residing abroad who return to their country of citizenship on a temporary visit are included with non-resident visitors.

Indicator definitions

A night spent (or overnight stay) is each night a guest / tourist actually spends (sleeps or stays) in a tourist accommodation establishment or in non-rented accommodation. Nights spent can be analysed according to the country of residence of the guest. Normally the date of arrival is different from the date of departure, although persons arriving after midnight and leaving on the same day are included in overnight stays.

A bedroom is the unit formed by one room or group of rooms constituting an indivisible rental in an accommodation establishment or dwelling. Rooms may be single, double or multiple, depending on whether they are equipped permanently to accommodate one, two or several people. The number of existing rooms is the number the establishment habitually has available to accommodate guests, excluding rooms used by the employees working for the establishment; bathrooms and toilets do not count as a room. An apartment is a special type of room: it consists of one or more rooms and has a kitchen unit and its own bathroom and toilet; apartments may be with hotel services (in apartment hotels) or without hotel services.

The number of bed places in an establishment or dwelling is determined by the number of persons who can stay overnight in the beds set up in the establishment or dwelling, ignoring any extra beds that may be set up at the customer's request. The term bed place applies to a single bed, while a double bed is counted as two bed places; this unit serves to measure the capacity of any type of accommodation. If the actual number of bed places is not known for a camping pitch, then the number of bed places is set to four.

The net occupancy rate of bedrooms is obtained by dividing the total number of bedrooms used during the reference period (in other words, the sum of the bedrooms in use per day) by the total number of bedrooms available for the reference period (in other words, the sum of bedrooms available per day). The occupancy rate of bed places is obtained by dividing the total number of overnight stays by the number of the bed places on offer (excluding extra beds) for those days when bed places are actually available for use (in other words, net of seasonal closures or other temporary closures, for example, to decorate). The results for occupancy rates are multiplied by 100 to be expressed as rates in percentage terms.