

Seaside tourism: High concentration of establishments and predominance of domestic tourism

It is always difficult to distinguish between seaside tourism and urban tourism because of their inherently interlinked origins and development. A seaside resort can develop into an urban centre (as in the case of Deauville, France) and equally, seaside tourism can develop in a coastal town (Alicante, Spain). However, the characteristic feature of seaside resorts is the seafront, and spatial planning that radiates out from it (180° compared with 360° in most towns).

Hotels and similar establishments are the most usual form of accommodation in seaside resorts. Because of their particular spatial planning and their power to attract tourists, seaside regions generally have very high concentrations of this type of establishment. This is particularly the case for the West-Vlaanderen region of Belgium, the Kentriki Makedonia region in Greece, Cataluña in Spain, etc. The level of concentration depends on each country's specific situation. The determining factors could be, depending on the case, competition within the sector (the existence of other seaside areas or tourist resorts) or competition between sectors (tourism versus other industrial activities).

Seaside regions generally have average-sized establishments, with fewer than 100 beds. The highest averages are recorded either in regions where seaside tourism coincides with urban tourism (in the case of the

large coastal cities, such as Stockholm in Sweden and Greater Lisbon in Portugal, where the average size of establishments is over 100 beds), or in regions where it is the main economic activity (such as the Algarve, Portugal where the average size of establishments is over 200 beds). At the other end of the spectrum, the lowest averages are recorded in regions where seaside tourism is not characterised by mass tourism (Dorset and Somerset in the United Kingdom, for example).

With the exception of regions of international renown, the activity of the vast majority of seaside regions is bolstered by domestic tourism. This is the case for Schleswig-Holstein (Germany) whose clientele is for the most part resident (approximately 96%). The same phenomenon can be seen on the coasts of Britain and Scandinavia, where levels of 90% of overnight stays by residents are frequent. The exceptions are the Algarve, Portugal (24% of overnight stays accounted for by residents), Cataluña, Spain (37.3%), Andalucía, Spain (42.4%), Veneto, Italy (39.6%), which are all regions of very high international standing.

The average length of stay in seaside regions is two to three days. This average is higher than that of regions with predominantly urban tourism, but lower than that of island regions.

Table 1: Share of overnight stays by residents in the total of overnight stays in hotels and similar establishments

Countries	National averages	Domestic tourism			
		Regions with the lowest levels		Regions with the highest levels	
Belgium	46.0%	Région Bruxelles-capitale/ Brussels hoofdstad gewest	7.8%	Namur	67.3%
Denmark	60.5%				
Germany	86.5%	Trier	63.7%	Mecklenburg-Vorpommern	97.7%
Greece	24.3%	Kriti	6.6%	Anatoliki Makedonia, Thraki	68.9%
Spain¹	31.9%	Baleares	9.3%	Principado de Asturias	90.1%
France	62.4%	Île de France	38.3%	Poitou-Charentes	84.8%
Ireland	33.4%				
Italy	58.9%	Veneto	39.6%	Molise	88.1%
Luxembourg	9.4%				
Netherlands¹	66.8%	Noord-Holland	35.5%	Gelderland	90.1%
Austria	28.5%	Tirol	7.9%	Burgenland	75.4%
Portugal	39.3%	Madeira	13.8%	Centro	81.8%
Finland	75.8%	Åland	46.2%	Itä-Suomi	89.2%
Sweden	78.4%	Stockholm	67.1%	Östra Mellansverige	85.2%
United Kingdom	70.8%	London	18.1%	East Riding and North Lincolnshire	95.8%

¹ = Year 2000

Urban regions: Business tourism and a wide range of attractions

As the diversity of urban regions is very wide, we will limit ourselves to the major cities (such as Paris, London, Berlin, Madrid, Brussels, etc.).

The specificity of urban tourism is that it is able to offer a combination of a multitude of individual attractions. The most obvious attractions are of course museums, casinos, amusement parks, festivals, monuments, architecture, etc. For some cities there may also be other less tangible attractions, such as "the atmosphere", and in some cases, the nightlife. In addition, these large cities are major administrative and commercial centres, which also generates large influxes of tourists.

Hotels and similar establishments are the most common type of accommodation in urban regions. However, the level of concentration of this type of establishment in urban regions is best examined at national level because large cities always give rise to zones of economic activity on their outskirts. Paris (France), for example, hosts 7.7% of national establishments, while the Ile de France, of which it is the centre, hosts 11.3%. Berlin hosts 1.1% of establishments in Germany, Brussels (Belgium) 8.5%, London (United Kingdom) 2.2%, Athens (Greece) 9.6%, Madrid (Spain) 7.7%, etc. The concentration in terms of overnight stays in these

regions is sometimes even higher: 19.4% for the Ile de France, 4.1% for Berlin, 15% for Brussels, 11.9% for Athens, 4.1% for Madrid, and 16.7% for London.

Comparison with national averages, the size of establishments in urban regions appears exceptionally large. While the average size of establishments in Great Britain is only twenty beds, the London average rises to 134. Brussels and Berlin come close to tripling the averages of their respective countries.

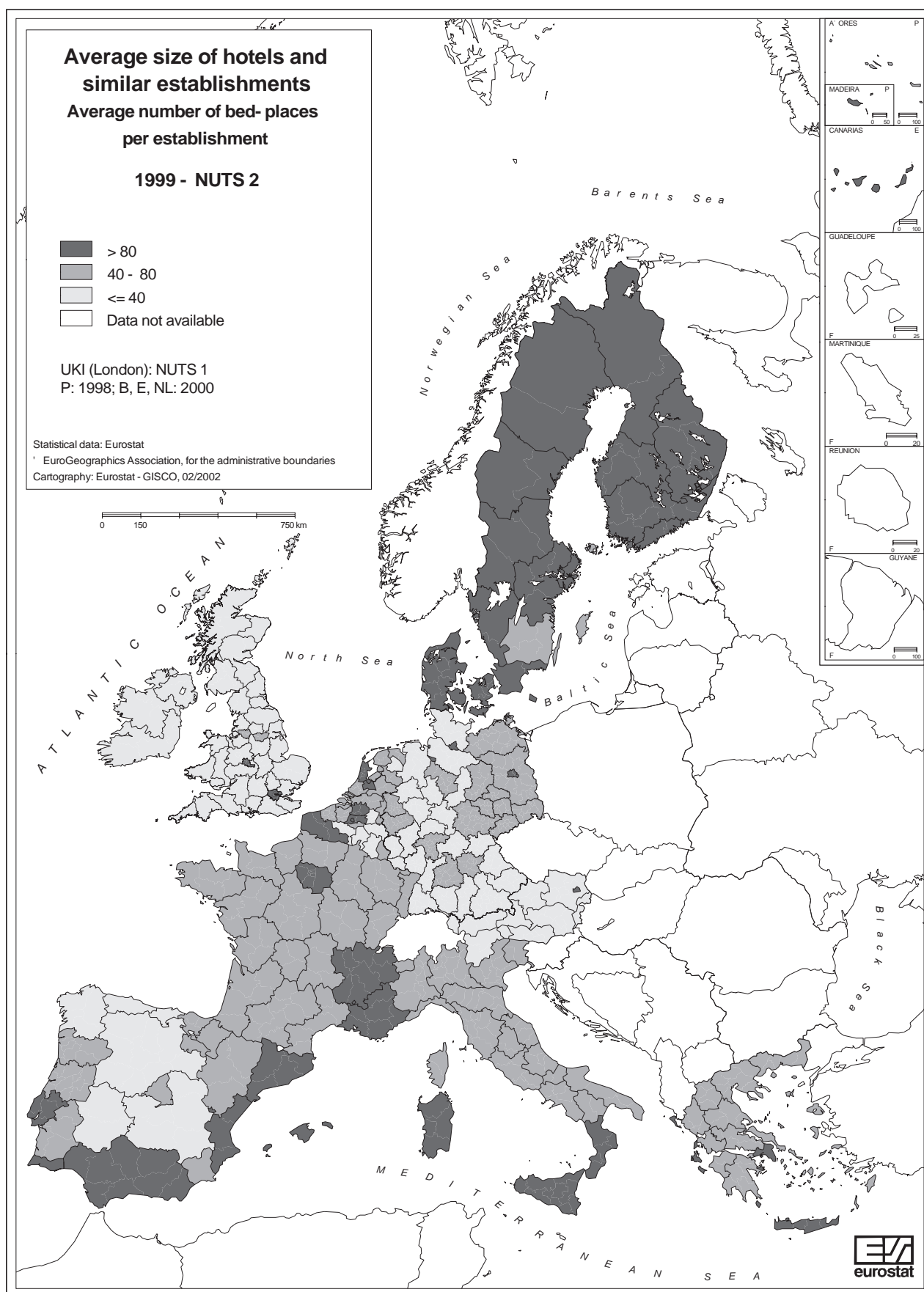
One of the main features of urban tourism is the low level of domestic tourism in terms of overnight stays. These low levels must be analysed in relation to the countries' average tourist flows. In Berlin for example, domestic tourism is lower than the national average (72.6% compared with 85.8% in 2000). In Brussels, domestic tourism accounted for only 7.8% of overnight stays in 1999. In London, this figure amounted to 18.1% in 1999. In Paris and Athens, the same phenomenon was seen, the only exception being Madrid where domestic tourism was higher than inbound tourism. However, visits to the Sierra de Guadarrama for winter sports can in part explain Madrid's atypical situation.

Probably because of the high cost of staying in these regions, the average length of stay is generally lower than national averages.

Table 2: Concentration of hotels and similar establishments in the EU capital's regions in 1999

Countries	Regions	N° of hotels and similar establishments	% of national totals
Belgium	Région Bruxelles-capitale/ Brussels hoofdstad gewest	172	8.5%
Denmark	København	85	94.4%
Germany	Berlin	445	1.1%
Greece	Attiki	788	9.6%
Spain	Comunidad de Madrid	1.242	7.7%
France	Île de France	2.230	11.3%
Ireland	Dublin	604	10.4%
Italy	Lazio	1.712	5.1%
Luxembourg	Luxembourg Centre	99	30.5%
Netherlands	Noord-Holland*	669	51.0%
Austria	Wien	344	18.0%
Portugal	Lisboa e Vale do Tejo	412	26.4%
Finland	Uusimaa (suuralue)	140	14.4%
Sweden	Stockholm	241	12.7%
United Kingdom	London	1.134	2.2%

* Year 2000



Island tourism: High concentration of establishments and long stays

Lack of space is the main characteristic of island regions. This generally leads to a low level of diversification of tourist resources, giving a central place to the combination of sea and sand duo, plus sun in the southern regions. Other attractions - such as casinos, festivals, cultural sites, etc.- are of course possible, but they are of secondary importance.

With a few exceptions (the Canary Islands, Corsica), hotels and similar establishments are the predominant type of accommodation in island regions. Taking into account the restricted surface area, the levels of concentration of establishments in island regions appear higher than those of urban regions. In Greece, for example, the islands of the Aegean Sea together with Crete accounted for 43.7% of hotel capacity in 1999. In Madeira and the Azores (Portugal), this level was 11.9% in 1999. To a lesser degree, the French overseas islands accounted for 1.6% in 2000, while Sicily and Sardinia accounted respectively for 2.6% and 2% of Italian hotel capacity in 1999.

In the majority of cases, these high levels in terms of accommodation capacity are mirrored in high overnight stay figures. In Greece, the Aegean islands plus Crete recorded 53.9% of national overnight stays in 1999, the Canary Islands 26.5%, Madeira 11.7% and Sicily and Sardinia 6.9%.

The average size of establishments in island regions is broadly comparable with that of urban regions. The average size of establishments in the French overseas islands is comparable to that of the Ile de France (111 beds compared with 114.9 in 2000). The Canary Islands stand out with particularly high averages (290.7 beds in 2000). The average size of establishments in the Greek Aegean islands and Crete is normal (79.1 beds). This makes their share of overnight stays even more remarkable. In fact, activity there is more regular, as Greece benefits from a sunnier climate for longer periods of the year than elsewhere (approximately 3000 hours annually).

Because of low domestic demand, island tourism is primarily based on an external clientele, whether resident or not. Certain islands are particularly appreciated by residents (Sicily, Sardinia, Northern Ireland and Corsica) while inbound tourism predominates in the Greek Islands, the Canaries, the Balearic Islands and Madeira.

The length of stay in island regions where domestic tourism predominates conforms to national averages. However, in regions where inbound tourism predominates, the averages recorded are the highest of any regions.

Rural tourism: Getting back to nature and the development of alternative accommodation

Rural tourism is defined as tourism where nature or the rural location are the main attractions. However, from a statistical point of view, a rural region is generally defined by default as a region that is neither urban, seaside, island nor mountain. Our definition of regions where rural tourism predominates is based on two factors: the main attraction must be nature or the rural location, and hotel activity must not predominate. This definition leads us to include regions such as Drenthe, Flevoland or Overijssel in the Netherlands, Limburg in Belgium and the regions of Cumbria and Northumberland in the United Kingdom, etc.

It should be remembered that as regards rural tourism, one of the main questions is to determine what level of development must not be exceeded for it to retain its specific characteristics. For this reason, it is more interesting to analyse to what degree regions depend on hotel infrastructures, if at all.

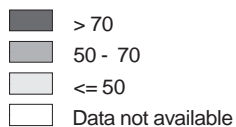
In the region of Limburg (Belgium), for example, overnight stays in hotels and similar establishments counted for 12.1% of the total in 1999. In the region of Drenthe (Netherlands), this level reached 20.7% in 2000. Because of their specific characteristics, rural regions' concentration in terms of overnight stays is generally low at national level. Drenthe, for example, had only 6.6% of overnight stays in the Netherlands in 2000.

The clientele for rural tourism is generally domestic and living nearby. The proportion of overnight stays by residents reached or even exceeded 90% in some regions such as Northumberland, Dorset, Somerset or Cornwall.

The average length of stay is longer in regions where rural tourism is coupled with seaside tourism (because of the multiple attractions). However, in the majority of regions, this length conforms to the country's national average.

Concentration of domestic tourism
Share of overnight stays by residents
in total overnight stays in hotels and
similar establishments

1999 - NUTS 2



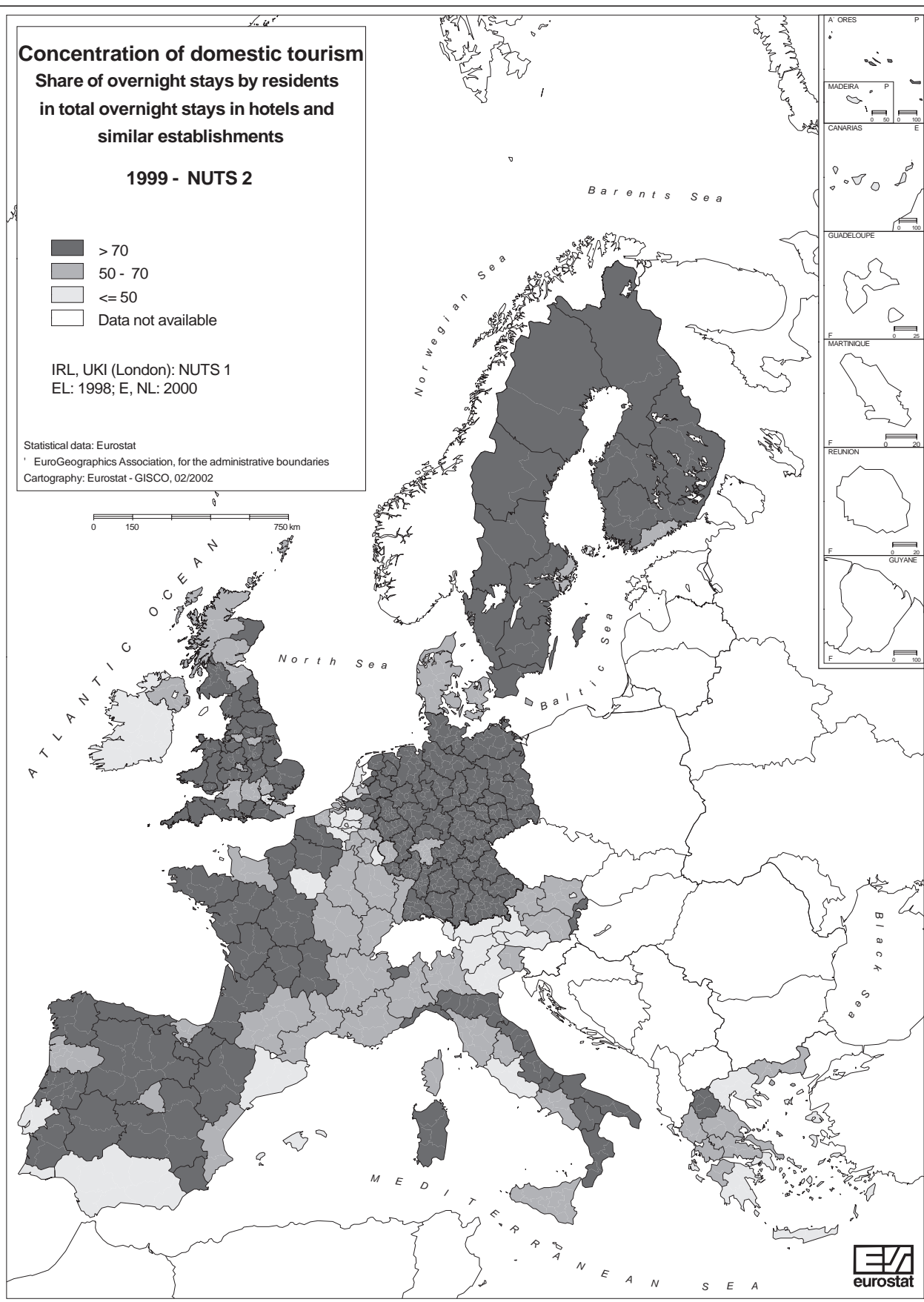
IRL, UKI (London): NUTS 1
 EL: 1998; E, NL: 2000

Statistical data: Eurostat

† EuroGeographics Association, for the administrative boundaries

Cartography: Eurostat - GISCO, 02/2002

0 150 750 km



Mountain tourism: a predominantly seasonal activity

Even if the range of attractions has widened to make mountain tourism less dependent on winter sports, they are still the main attraction, and the majority of overnight stays are recorded during the winter season.

Hotels and similar establishments are the most usual type of accommodation in these regions. Thus, in regions where mass tourism predominates, the concentration of hotel capacity can prove high. In Tyrol (Austria), for example, the hotel capacity accounts for approximately 30% of the national total, while in Trentino-Alto Adige (Italy) it accounts for 18%. However, because of the seasonal nature of these regions' activity, their weight in terms of overnight stays often lags behind their weight in terms of hotel capacity. Tyrol,

for example, counts for less than 17% of Austrian overnight stays, while Trentino-Alto Adige recorded approximately 7.5% of Italian overnight stays. It must also be pointed out that the characteristics of this Alpine area, which extends from Garmisch (Germany) to Cortina d'Ampezzo (Italy), cannot be taken to apply to all mountain regions as a whole, where on average both accommodation capacities and activity in terms of overnight stays are low.

Domestic tourism generally predominates in mountain regions, with the exception of the alpine area specified above. This area also stands out because of the higher than average lengths of stay, unlike other mountain regions.

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

NUTS

The regional types used in this study are based on the regional divisions in Eurostat's Nomenclature of Territorial Units for Statistics (NUTS). However, the fact that NUTS accords greater importance to institutional demarcations means that these regions are to varying degrees heterogeneous patchworks of types. At the level of regional tourism, this heterogeneity is seen in the existence of several types of tourism within the same region. It is therefore necessary to explain how regions were classified under one type of tourism rather than another.

NUTS is a hierarchical classification on five levels (three regional and two local). Each Member State is divided into a whole number of NUTS1 level regions, and each region is in turn divided into a whole number of NUTS2 regions, which are in turn divided into NUTS3. Regions are classified as specialising in a type of tourism by analysing what they offer at NUTS3 level. By compiling and analysing the specific weights of the various NUTS3 in terms of facilities, they are then categorised at NUTS2 level. The same logic is then applied to progress from NUTS2 to NUTS1 level. Regions were therefore classified into a type of tourism by working up from level NUTS3 to level NUTS1.

Some Member States do not have a breakdown at NUTS1 and NUTS2 levels (Luxembourg, Ireland and Denmark). Their regional tourism could therefore not be included in this study.

CONCEPTS AND DEFINITIONS

Tourism

The activities of persons travelling to and staying in places outside their usual environment for not more than 12 consecutive months for leisure, business and other purposes.

There are three elementary forms of tourism in relation to a given area (e.g. region, country, group of countries):

- i) Domestic tourism: this is defined as comprising the activities of residents of a given area travelling only within that area, but outside their usual environment;
- ii) Inbound tourism: this is defined as comprising the activities of non-residents travelling in a given area that is outside their usual environment;
- iii) Outbound tourism: this is defined as comprising the activities of residents of a given area travelling to and staying in places outside that area (and outside their usual environment).

Hotels and similar establishments

Hotels

Comprise hotels, apartment hotels, motels, roadside inns, beach hotels, residential clubs and similar establishments providing hotel services including more than daily bed-making and cleaning of the room and sanitary facilities.

Nights spent by residents and non-residents

A night spent (or overnight stay) is each night that a guest actually spends (sleeps or stays) or is registered (his/her physical presence there being unnecessary) in a collective accommodation establishment or in private tourism accommodation. Overnight stays are calculated by country of residence of the guest and by month.

Further information:

➤ Reference publications

Title Tourism in Europe
Catalogue No CA-23-99-031-EN-C Price EUR

➤ Databases

NewCronos, Domain Tourism

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