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# Tourism in the European Union In 2003

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On the basis of the first figures available for the months January to October 2003, tourism in terms of guest flows in hotels and similar establishments, in the European Union as a whole remained stable compared to the situation in 2002:

- The total number of nights spent in hotels and similar establishments was almost stable in Germany, Austria, Finland and Sweden.
- Decreases were seen in Belgium, Denmark, Italy, the Netherlands, and the United Kingdom, among which the decrease of nights spent in the Netherlands was the highest.
- Contrary to the overall tendency, considerable growth rates in guest nights could be seen in Spain and in Portugal, where the growth rates during the first 10 months of 2003, compared to the same period in 2002, were 2.5 % and 3.7 % respectively.
- As regards the Acceding Countries, Slovenia experienced an increase of both resident and non-resident nights in hotels and similar establishments during the first 10 months of 2003 by 3.5 %. The Czech Republic, on the other hand, recorded near stability, with a small decrease in nights spent of 0.2 %.
- Accommodation structure remained stable within the European Union (EU-15) over the past years, whilst in some of the Acceding Countries, massive increases in bed capacity were recorded in 2002: in the Czech Republic, in Poland and in Slovakia.

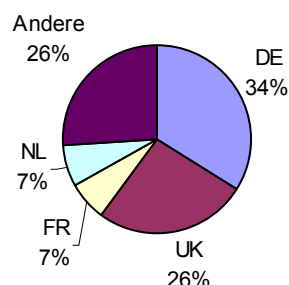


Chart 1: Percentage of main tourism generating countries to EU-15 destinations (2002)



## Trends in nights spent 2003

Table 1: Number of nights spent in hotels and similar establishments, 2003 (thousands)

	J	F	M	A	M	J	J	A	S	O	Total J-O/02	Total J-O/03	Var.%
BE	721	865	1044	1202	1350	1293	1413	1541	1358	1248	12402	12034	-3.0
DK	442	475	589	614	868	896	1326	1117	887	733	8032	7948	-1.0
DE	10471	10906	13053	14208	18892	18110	19163	20848	20782	18673	165169	165107	0.0
EL	:	:	:	:	:	:	:	:	:	:	:	:	:
ES	10100	11094	14407	17305	20956	24049	28489	33892	25933	19607	200843	205832	2.5
FR	10863	11730	13783	15194	:	:	:	:	:	:	169179	:	:
IE	661	680	864	1556	1733	1765	:	:	:	:	15496	:	:
IT	11997	11833	13674	16128	18366	26950	32640	38559	23748	15141	212338	209036	-1.6
LU	:	:	:	:	:	:	:	:	:	:	1078	:	:
NL	1425	1535	1950	2458	2581	2549	2627	3197	2547	2474	24991	23343	-6.6
AT	7986	8549	7515	4262	4166	5803	7437	9754	6326	4171	65735	65970	0.4
PT	1557	1845	2404	2912	3165	3352	3921	4827	3547	2829	29287	30359	3.7
FI	861	977	1133	993	962	1337	1665	1374	1121	1009	11361	11431	0.6
SE	1210	1410	1677	1493	1897	1925	2774	2300	1901	1743	18255	18331	0.4
UK	10240	12113	13004	13871	15960	16063	19024	21911	18494	16751	159353	157431	-1.2
IS	:	:	:	:	:	:	:	:	:	:	1172	:	:
NO	948	1216	1350	1010	1078	1674	2208	1886	1300	1109	14335	13779	-3.9
CH	2568	2853	2984	2122	2063	2695	3431	3757	2977	2244	28535	27694	-2.9
LI	10	11	11	7	8	9	12	11	9	7	97	94	-3.0
CZ	1511	1767	1784	1836	2210	2052	2504	2683	2304	2331	21030	20982	-0.2
EE	99	124	156	183	248	260	355	305	234	223	:	2188	:
LV	84	95	106	113	142	162	210	197	153	134	:	1397	:
SI	325	324	344	379	441	479	513	622	494	406	4178	4326	3.5
SK	583	649	536	496	601	650	803	887	660	:	:	:	:

## Accommodation structure

Bed capacity in hotels and similar establishments in the EU remained fairly stable over the years 1999 to 2002. However, figures from the Acceding Countries show that the number of bed places is rapidly increasing. Especially in Slovakia and in

the Czech Republic the growth rate of bed capacity was extremely high. Together, the Acceding Countries will add another 800000 beds to the capacity in the EU after enlargement, which is about 8% of the capacity in the EU-15.

Table 2: Number of bedplaces in hotels and similar establishments

Number of bedplaces / growth rate	Year				%	%	%
	1999	2000	2001	2002	2000/1999	2001/2000	2002/2001
Eurozone	7501347	7665830	8427121	8532759	2,2	9,9	1,3
European union (EU-15)	9521175	9714484	9885954	9945611	2,0	1,8	0,6
CZECH REPUBLIC	203819	211631	203972	245957	3,8	-3,6	20,6
ESTONIA	16034	16292	17385	15895	1,6	6,7	-8,6
CYPRUS	83347	84479	87834	90112	1,4	4,0	2,6
LATVIA	12453	11890	13139	:	-4,5	10,5	:
LITHUANIA	11553	11489	11071	11980	-0,6	-3,6	8,2
HUNGARY	144600	143573	148205	154643	-0,7	3,2	4,3
MALTA	40771	40312	40425	:	-1,1	0,3	:
POLAND	120285	120280	118213	127559	0,0	-1,7	7,9
SLOVENIA	29541	30576	27695	28211	3,5	-9,4	1,9
SLOVAKIA	43304	43763	48723	53856	1,1	11,3	10,5

## Top tourism generating countries

Table 3: Tourism generating markets, 2002, calculated as % share of total nights spent in hotels and similar establishments by non residents according to their country of residence

	1 <sup>st</sup> Market		2 <sup>nd</sup> Market		3 <sup>rd</sup> Market		4 <sup>th</sup> Market		Share of top 4 markets
	Country	%	Country	%	Country	%	Country	%	%
<b>BE</b>	UK	22.9	NL	16.0	FR	12.7	DE	11.8	63.4
<b>DK</b>	SE	22.1	N	18.7	UK	10.5	DE	9.6	60.9
<b>DE</b>	US	11.6	NL	10.6	UK	9.8	IT	6.1	38.1
<b>EL</b>	DE	32.0	UK	17.6	IT	6.1	FR	5.0	60.7
<b>ES</b>	UK	32.3	DE	27.3	FR	6.6	IT	5.0	71.2
<b>FR</b>	UK	23.4	DE	10.9	US	10.7	IT	9.8	54.8
<b>IE</b>	UK	37.4	US	25.5	DE	6.4	FR	6.3	75.6
<b>IT</b>	DE	32.0	UK	9.0	US	8.0	FR	7.9	56.9
<b>LU</b>	BE	23.7	NL	15.2	DE	13.6	FR	10.2	62.7
<b>NL</b>	UK	23.2	DE	18.8	US	11.3	FR	5.4	58.7
<b>AT</b>	DE	58.7	NL	7.4	UK	5.1	CH	4.9	76.1
<b>PO</b>	UK	30.8	DE	19.2	ES	8.1	NL	7.5	65.6
<b>FI</b>	SE	12.5	DE	10.7	UK	9.7	US	5.4	38.3
<b>SE</b>	NO	17.7	DE	12.4	UK	10.4	US	7.7	48.2
<b>UK</b>	US	24.4	DE	8.6	FR	6.2	NL	6.2	45.4
<b>IS</b>	DE	16.9	UK	15.6	US	12.1	SE	8.0	52.6
<b>LI</b>	DE	37.1	CH	26.7	US	4.2	AT	3.7	71.7
<b>NO</b>	DE	16.3	DK	15.7	SE	11.7	UK	10.6	54.3
<b>CH</b>	DE	31.2	UK	10.5	US	8.9	FR	6.7	57.3

Most EU countries had as the top tourism generating countries either Germany or the United Kingdom. In 2002, German tourists were Austria's, Italy's and Greece's first market representing 58.7%, 32.0% and 32.0% respectively of all non-resident overnight stays in hotels and similar establishments (table 2). British tourists were Ireland's, Spain's, Portugal's, France's, Netherlands's and Belgium's first market accounting for 37.4%, 32.3%, 30.8%, 23.4%, 23.2% and 22.9% respectively of all non-resident overnight stays in hotels and similar establishments. Swedish tourists were the main market for both Denmark and Finland, accounting for 22.1% and 12.5% respectively of all nights spent there by non-residents in hotels and similar establishments. For Sweden, the primary source of inbound tourism was Norway, providing 17.7% of non-resident nights spent in hotels and similar establishments. Belgian tourists represented a large slice of the market for Luxembourg, accounting for 23.7% of all non-resident

overnight stays in hotels and similar establishments. The USA was the top tourism generating market for Germany and the UK, providing 11.6% and 24.4% respectively of total non-resident overnight stays in hotels and similar establishments. Compared to previous years, it can be seen that there was a change in the first market for Spain. While Germany had been the first market for Spain during many years, since 2002, this has changed to the United Kingdom. This may be related to the tendency of German residents to spend their holidays in their own country. On the other hand, the importance of the EU Member states as markets for the USA has decreased, although a considerable number of Americans still spend their holidays in Europe. French residents are not among the top tourism generating visitors in any EU Member State: only in Belgium, Spain and the United Kingdom, do they even rank third. This underlines the fact that most French residents spend their holidays in their home country and not abroad.

# Further information:

## ➤ Reference publications

Title Tourism Statistics Yearbook 2003 CD-ROM  
 Catalogue No KS-DS-03-001-3A-Z Price EUR 120

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