

Regional tourism in the European Union

Statistics in focus

INDUSTRY, TRADE AND
SERVICES

POPULATION AND
SOCIAL CONDITIONS

27/2006

Author

Ulrich SPÖREL

Contents

| | |
|--|---|
| Main features | 1 |
| Coastal regions account for the highest numbers of bed places in the European Union..... | 1 |
| Capital regions and islands heavily dependent on foreign tourists | 5 |

Main features

- Traditional EU summer holiday regions have the highest accommodation capacities.
- Number of bed places: 7 French regions amongst the top 20 EU-25 NUTS 2 regions.
- Total nights spent: More than half of the top 20 EU-25 NUTS 2 regions are located in Italy (6) and Spain (5).
- Highest shares of foreign tourists in regions with art and capital cities and on islands.

Coastal regions account for the highest numbers of bed places in the European Union

From the data available, the number of bed places is the main indicator showing accommodation capacity at regional level. At EU level, the number of bed places is collected for hotels and similar establishments, holiday dwellings, campsites and other collective accommodation establishments, such as youth hostels and tourist residences.

Map 1 shows the distribution of bed places per 1 000 inhabitants. This variable gives an indication of the maximum number of tourists that can be accommodated in a region at the same time. However, for the purposes of interpreting this indicator, it has to be considered that many regions register high values due to a large number of bed places and others due to a small population (e.g. islands or rural areas in general).

In 2004, 16 (corresponding to 6.3%) out of a total of 254 NUTS 2 regions in the European Union recorded more than 200 bed places per 1 000 inhabitants, which can be seen as an indication of a relatively high incidence of tourism in these areas. On the other hand, 139 (corresponding to 54.7%) of all regions were in the category with 50 and fewer bed places. 9 Member States have at least one region included in the category with more than 200 bed places. These are Belgium, Greece, Spain, France, Italy, the Netherlands, Austria, Portugal and Finland. In the group with the smallest number of bed places (fewer than 50) the majority of the regions are located in the new Member States of Central and Eastern Europe.

Greece, Italy and Austria, with 3 regions each, accounted for the largest number of regions in the category with more than 200 bed places per 1 000 inhabitants. The highest values were recorded for the Greek region of Notio Aigaio with 532 places, the Spanish Illes Balears with 464 places and the Italian region of Bolzano with 455 places. In the case of the latter two, this is due to the large absolute number of bed places, whereas Notio Aigaio has a small population, like a number of other peripheral regions. These regions are mainly island regions, such as Corse (FR), Ionia Nisia (EL, including the islands of Zakynthos, Kerkyra, Kefallinia and Lefkada) and Åland (FI).



Map 1: Number of bed places per 1 000 inhabitants, EU-25, NUTS 2, 2004

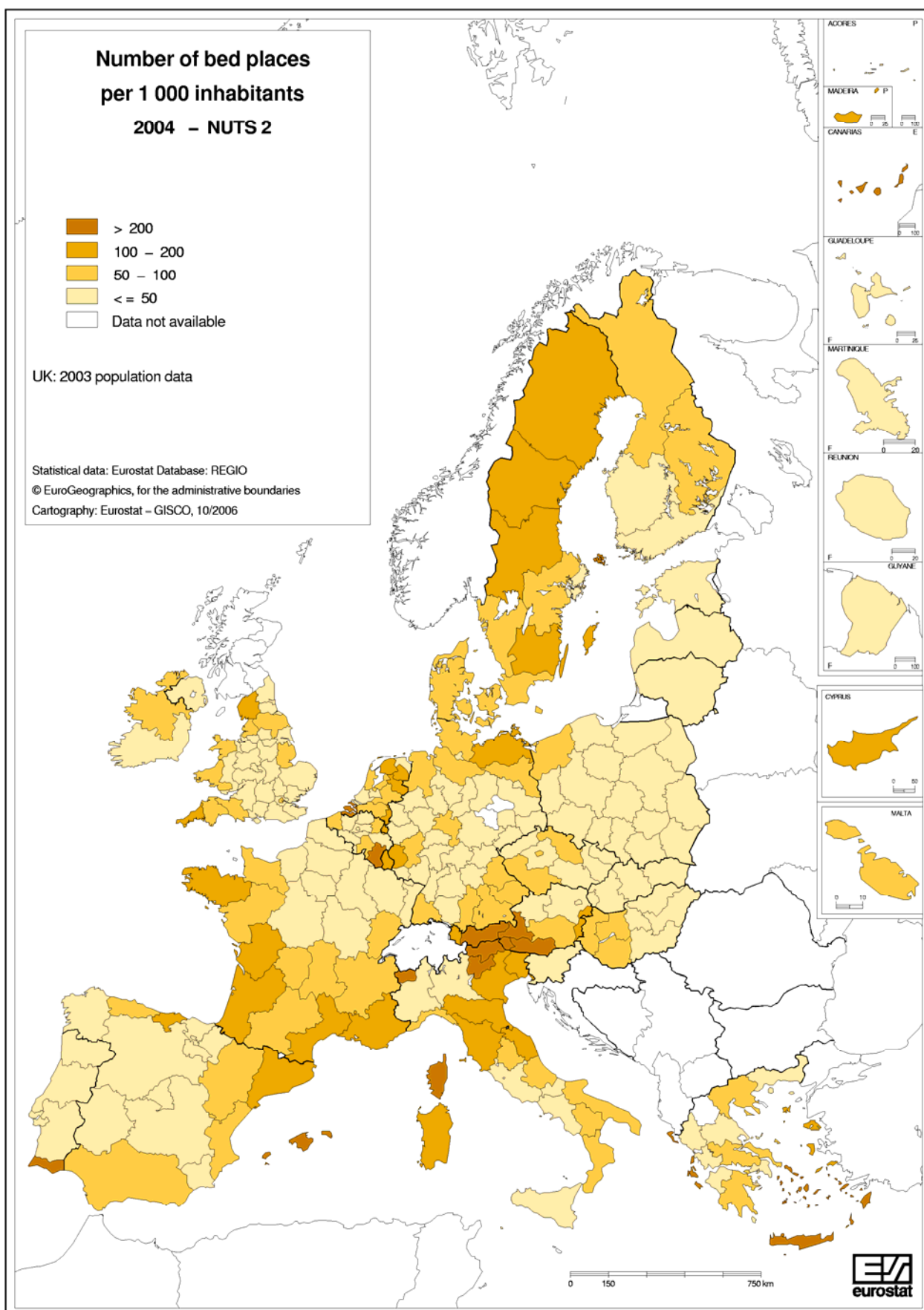
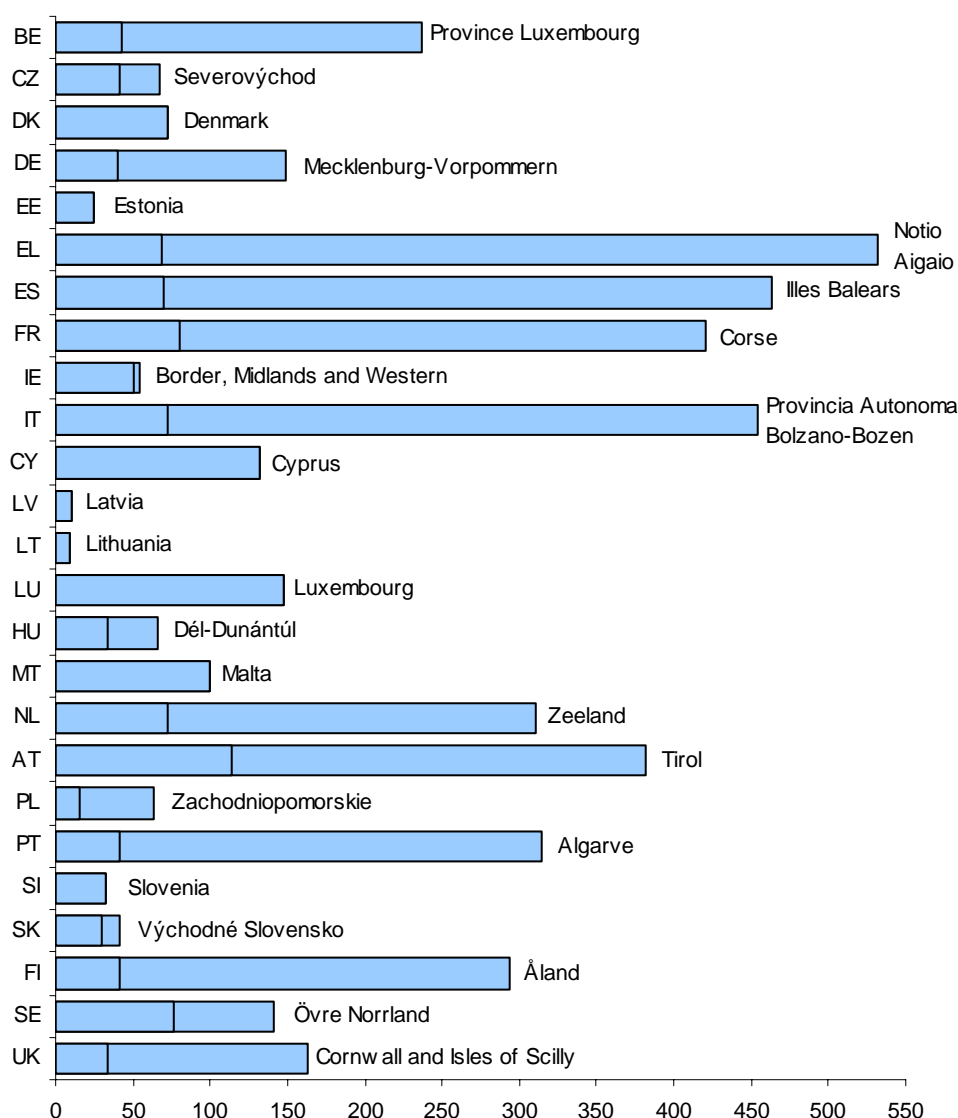


Figure 1: Regions (NUTS 2) with the highest concentration of bed places per 1 000 inhabitants, per EU Member State, 2004



The vertical line in the bars shows the average of each country. For DK, EE, CY, LV, LT, LU, MT and SI the whole country is the only NUTS 2 region.

NB: For UK 2003 population data.

Figure 1 shows the NUTS 2 regions with the highest number of bed places per 1 000 inhabitants in each Member State and the country average. Where the Member State has only one NUTS 2 region, its value is the country average. The traditional summer holiday destinations Greece, Spain, France, Italy, Cyprus and Malta, show the highest averages, together with Luxembourg, Austria and the Nordic countries, Denmark and Sweden. By far the smallest averages are registered for the Baltic States (Lithuania 9, Latvia 10, Estonia 24), and for Poland, with 15 bed places per 1 000 inhabitants. For Member States where it is possible to compare between the country average and the NUTS 2 regions with the highest bed density, it is interesting to note that the Portuguese region Algarve and the Greek region Notio Aigaio recorded almost 8 times the average bed density.

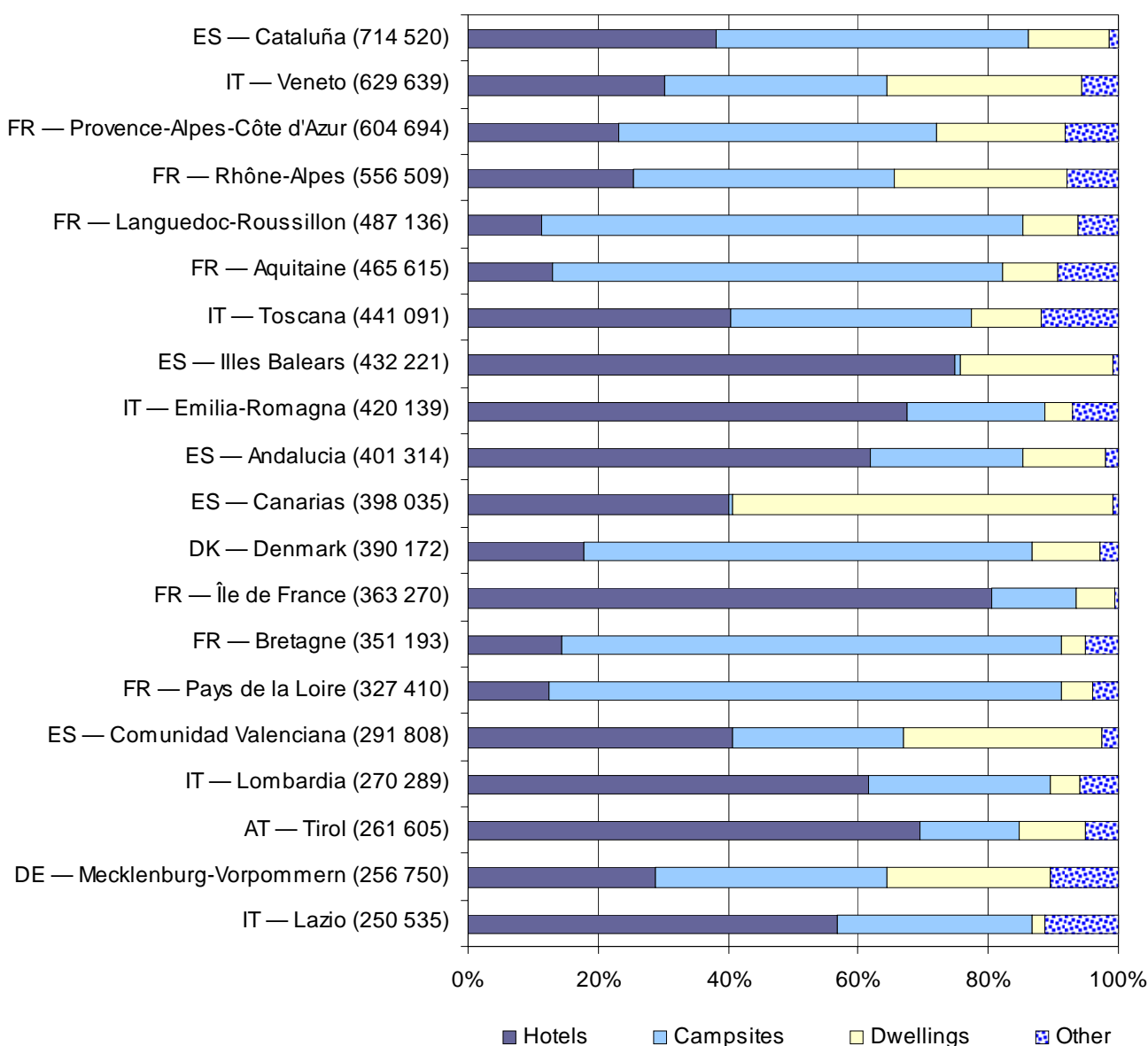
The smallest relative differences between the country average and the region with the highest number of bed places were recorded in Ireland, the Czech Republic and Slovakia. In the latter two Member States the bed density is fairly evenly distributed across all regions and varies between half and twice the averages of 42 bed places per 1 000 inhabitants in the Czech Republic and 30 bed places in Slovakia.

In addition to bed density, the absolute number of bed places per region and their distribution over the different accommodation categories is an important indicator of the characteristics and capacity of tourism supply in a region. But any comparison of the regions in Figure 2 must bear in mind that they are of different sizes and show big differences in terms of number of inhabitants.

Figure 2 shows the top 20 EU-NUTS 2 regions by number of bed places, broken down by accommodation category. For 2004, all of these top 20 regions recorded more than 250 000 bed places. 7 of them are located in

France, and 5 each in Spain and in Italy. Looking at the share of the different accommodation categories across all bed places, it is interesting to note that the majority of bed places are either for hotels and similar establishments or for campsites, with the exception of the Illes Balears, the Canarias and Comunidad Valenciana, where bed places in dwellings represent the biggest share or are in second position. 16 of these top 20 regions either have access to the coast or they are islands.

Figure 2: Top 20 EU-25 tourist regions (NUTS 2) - Distribution of bed places by type of accommodation, 2004

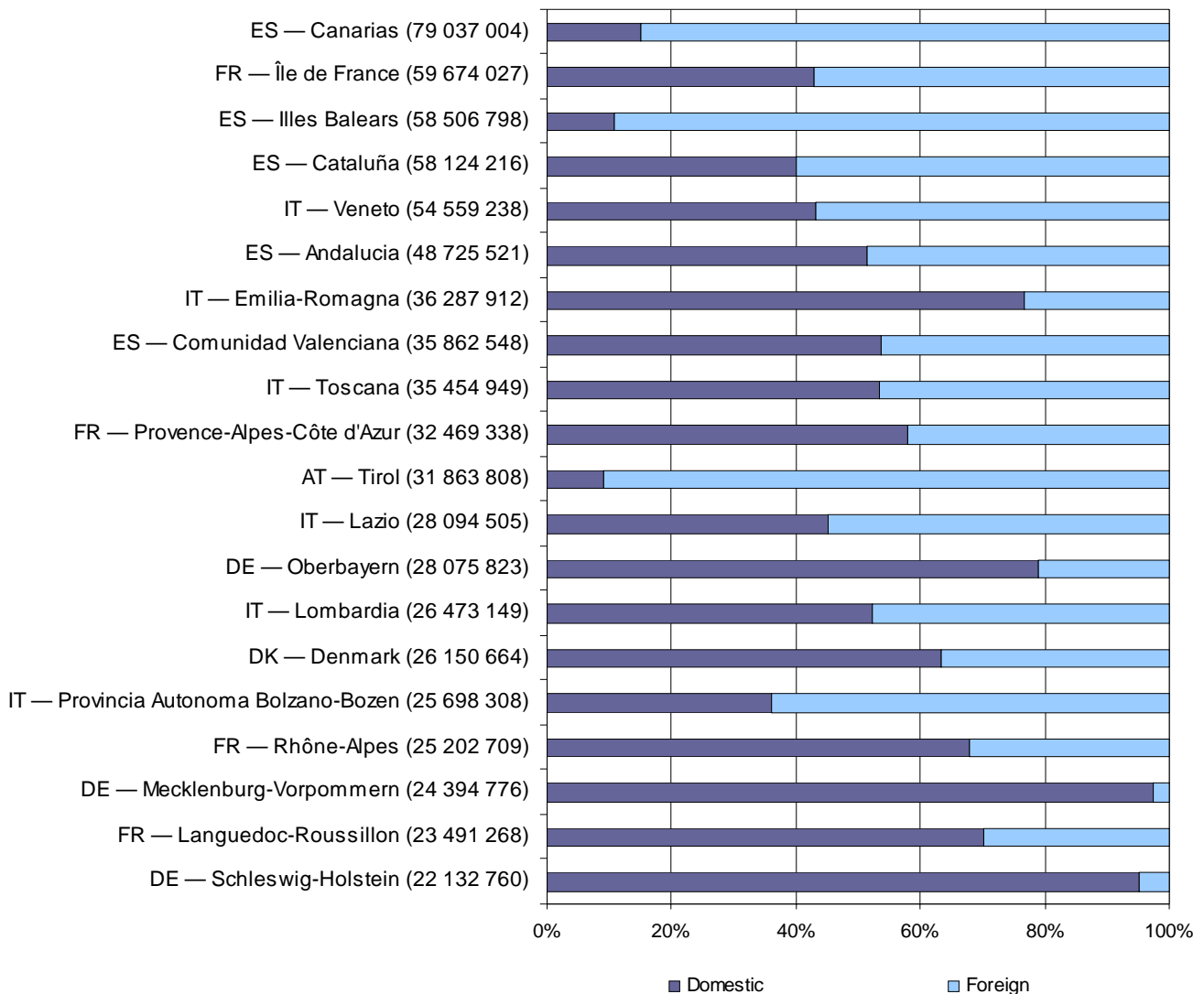


Capital regions and islands heavily dependent on foreign tourists

Nights spent in accommodation is the main indicator used to provide detailed information on the use of bed places in regions. Supply-side statistics also provide information on the origin of tourists requesting bed places, i.e. tourists from the home country (domestic or resident tourists) or tourists from other countries (foreign or non-resident tourists). Analysing the share of nights spent by origin of tourists in an individual country or region gives information about the degree of internationalisation of tourism. However, any analysis of this data has to take account of the fact that this distribution also depends on tourist characteristics (e.g. business or personal) and the size of the country/region.

Figure 3 shows, for all countries for which data are available, the top 20 EU regions recording the highest number of total nights, divided by foreign and domestic tourists. In absolute figures, 14 of the top 20 regions do not even come to half of the total number of nights spent in the Spanish Canarias, which is the NUTS 2 region in the EU-25 with the highest number of nights spent. All except 6 - which include important art and capital cities such as Île de France with Paris, Oberbayern with Munich and Lombardia with Milano, or mountain regions such as Rhône-Alpes in France, Bolzano in Italy and Tyrol in Austria - are regions with access to the seaside and thus typical summer holiday destinations for resident and/or foreign tourists. They are located in Spain (5), Italy (4), France and Germany (2 each) and Denmark (the country itself is a NUTS 2 region).

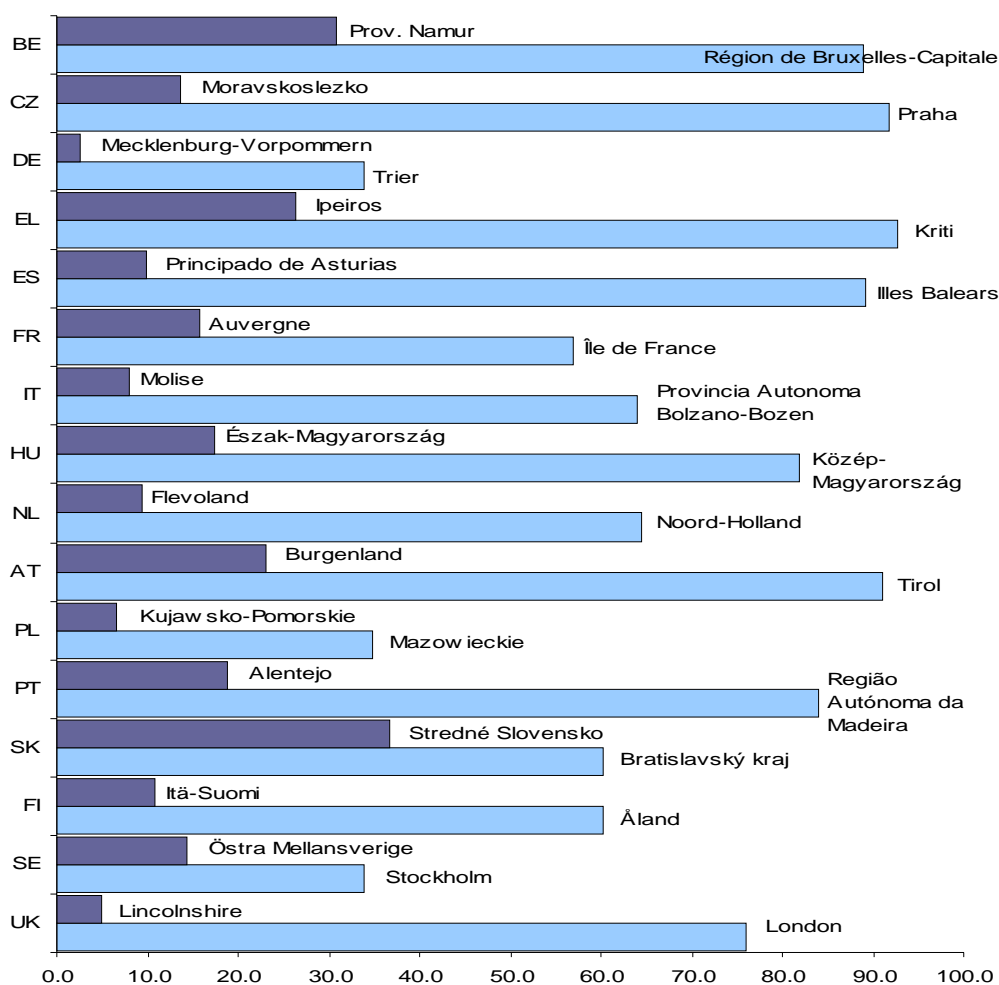
Figure 3: Top 20 EU-25 tourist regions (NUTS 2) — Distribution of total nights spent by tourist origin, 2004



As regards the distinction between foreign and domestic tourists for the top 20 regions, it is interesting to note that the share of domestic tourists in all 3 German regions (between 79.0% and 97.4%) is very high compared to all other top 20 regions. On the other hand, Spanish, French and Italian regions in the EU top 20 generally show, together with Tyrol, the highest shares of non-resident tourists in total nights. However, there are only three regions each in Spain and Italy,

and one each in France and Austria, that recorded a larger share of foreign tourists than domestic tourists over all nights spent in the region. These eight regions in the top 20 are amongst the most popular tourist destinations in Europe for beach tourism (Illes Balears, Canarias and Cataluña in Spain, Veneto in Italy), cultural and city tourism (Île de France with Paris and Lazio with Roma) or mountain tourism (Bolzano in Italy and Tyrol in Austria).

Figure 4: Regions (NUTS 2) with the highest and lowest shares of foreign tourists (share of total nights spent), 2004 (%)



NB: No data available at NUTS 2 level for DK, EE, CY, LU, LV, LT, LU, MT and SI because the countries themselves represent NUTS 2 level.

Figure 4 compares the regions with the highest and lowest percentages of foreigners in total nights for each Member State for which data are available. The upper levels in each Member State indicate to what extent a country and its respective regions are able to attract foreign visitors. In general, of the 16 Member States for which data are available, none of the German, Polish and Swedish NUTS 2 regions reaches a share of foreign tourists of at least 40%. In all other Member States, there is at least one region which recorded a share of foreign tourists of 55% and more. In general, Member States can be divided into three groups: those in which the differences between the highest and the lowest values are relatively small (less than 35 percentage points); those with differences between 35

and 65; and those with differences of more than 65 percentage points. Germany, Poland, Slovakia and Sweden belong to the first group while the Czech Republic, Greece, Spain, Austria, Portugal and the United Kingdom are in the group with the biggest differences. With one exception (Région de Bruxelles-Capitale – BE), all regions with the greatest attraction for foreign tourists are also located in the latter group of countries.

Many of the most attractive regions include art and business/congress cities such as Praha (CZ), Vienna (AT) and Inner London (UK), or regions characterised by beach tourism (Illes Balears in Spain, Kriti in Greece, Madeira in Portugal) or mountain tourism (Tyrol in Austria).

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

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 just daily bed-making and cleaning of the room and sanitary facilities.

Similar establishments

Comprise rooming and boarding houses, tourist residences and similar accommodation arranged in rooms and providing limited hotel services including daily bed-making and cleaning of the room and sanitary facilities. This group also includes guest-houses, Bed & Breakfast and farmhouse accommodation.

Other collective accommodation establishments

Holiday dwellings

Include collective facilities under common management, such as clusters of houses or bungalows arranged as dwelling-type accommodation and providing limited hotel services (not including daily bed-making and cleaning).

Tourist camp-sites

Consist of collective facilities in enclosed areas for tents, caravans, trailers and mobile homes. All come under common management and provide some tourist services (shop, information, and recreational activities).

Other collective establishments n.e.c.

Comprise youth hostels, tourist dormitories, group accommodation, holiday homes for the elderly, holiday accommodation for employees and workers' hotels, halls of residence for students and school dormitories, and other similar facilities that come under common management, have a social interest and are often subsidised.

Number of bed places

Determined by the number of persons who can stay overnight in the beds set up in an establishment (dwelling), ignoring any extra beds that may be set up by customer request. The term applies to a single bed, double bed being counted as two bed places. A bed place is also a place on a pitch or on a boat on a mooring to accommodate a person. One camping pitch should equal four bed places if the actual number of bed places is not known. The unit measures the capacity of any type of accommodation.

Bed density

Number of bed places per 1 000 inhabitants.

Number of tourism nights

A tourism night (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.

Regional classification NUTS:

The present NUTS nomenclature valid from 11 July 2003 onwards and extended to EU-25 on 1 May 2004 subdivides the economic territory of the European Union into 89 regions at NUTS 1 level, 254 regions at NUTS 2 level and 1214 regions at NUTS 3 level.

Despite the aim of ensuring that regions of comparable size all appear at the same NUTS level, each level still contains regions which differ greatly in terms of area, population, economic strength or administrative powers. This diversity at Community level is often only a reflection of the situation at Member State level.

For a list of European Statistical regions see http://ec.europa.eu/comm/eurostat/ramon/nuts/splash_regions.html

Country abbreviations:

| | | | |
|----|----------------|----|----------------|
| BE | Belgium | LU | Luxembourg |
| CZ | Czech Republic | HU | Hungary |
| DK | Denmark | MT | Malta |
| DE | Germany | NL | Netherlands |
| EE | Estonia | AT | Austria |
| EL | Greece | PL | Poland |
| ES | Spain | PT | Portugal |
| FR | France | SI | Slovenia |
| IE | Ireland | SK | Slovakia |
| IT | Italy | FI | Finland |
| CY | Cyprus | SE | Sweden |
| LV | Latvia | UK | United Kingdom |
| LT | Lithuania | | |

This publication has been produced in collaboration with Volker Stabernak and Valeria Minghetti (both comments) and Christiane Gengler (tables, figures and layout).

Date of data extraction: 12 April 2006.

OTHER RECENT RELEASES ON TOURISM:

Panorama on Tourism

Pocketbook on Tourism

Statistics in Focus 20/2006 – Tourism and the Internet in the European Union

Statistics in Focus 19/2006 – Summer tourism trends in 2005

Statistics in Focus 18/2006 – How Europeans go on holiday

Statistics in Focus 05/2006 – Inbound and outbound tourism in the European Union

Statistics in Focus 43/2005 – Winter season tourism trends 2004/2005

Statistics in Focus 34/2005 – ICT in the tourism sector

Statistics in Focus 32/2005 – Employment in hotels and restaurants in the enlarged EU still growing

UPCOMING RELEASES:






Statistics in Focus XX/2006 – Camping Tourism in the European Union

Further information:

Data: [Website EUROSTAT/Home page/Industry, trade and services/Data](http://www.eurostat.europa.eu/Website/EUROSTAT/Home_page/Industry,_trade_and_services/Data)

Industry, trade and services

Tourism

-  Capacity of collective tourist accommodation : local units on national territory
-  Occupancy in collective accommodation establishments : domestic and inbound tourism
-  Tourism demand : domestic and outbound tourism (excluding day-trips)
-  Tourism statistics for Albania, Bosnia and Herzegovina, Croatia and FYROM
-  Employment in the tourism sector (Source: Labour Force Survey 'LFS')

Journalists can contact the media support service:

Bech Building Office A4/125
L - 2920 Luxembourg

Tel. (352) 4301 33408
Fax (352) 4301 35349

E-mail: eurostat-mediasupport@ec.europa.eu

European Statistical Data Support:

Eurostat set up with the members of the 'European statistical system' a network of support centres, which will exist in nearly all Member States as well as in some EFTA countries.

Their mission is to provide help and guidance to Internet users of European statistical data.

Contact details for this support network can be found on our Internet site: <http://ec.europa.eu/eurostat/>

A list of worldwide sales outlets is available at the:

Office for Official Publications of the European Communities.

2, rue Mercier
L - 2985 Luxembourg

URL: <http://publications.europa.eu>

E-mail: info-info-opoce@ec.europa.eu
