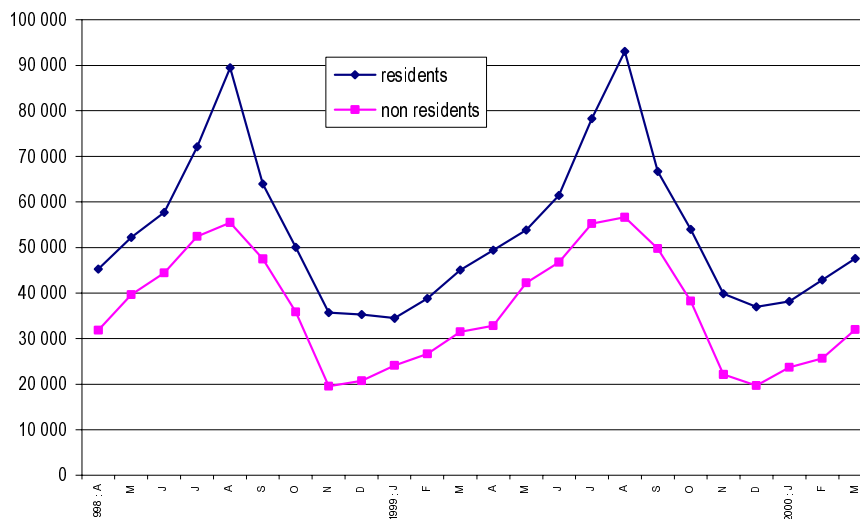


Domestic tourism up in Europe

Hans-Werner Schmidt



Note : Excluding Greece and Ireland

Figure 1: Nights spent by residents and non residents in hotels and similar establishments in EU countries ('000s)

Statistics in focus

INDUSTRY, TRADE AND SERVICES

THEME 4 – 16/2001

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The seasonal trends over the period 1998 and 1999 indicate continued growth in tourism in the EU countries, both in terms of guest flows in hotels and similar establishments and travel receipts and expenditures. Preliminary figures of the first six months of year 2000 indicate that this trend is likely to last. When comparing the seasonal trends of 1999 in terms of nights spent in hotels and similar establishments, the figures for the first 6 months of 2000 indicate positive growth rates in many EU countries. Notably in terms of resident nights spent, Belgium, experienced a growth of 16.7%, coupled with an increase of 3.6% of non-resident nights. This growth can partly be attributed to the hosting of the Euro 2000 football championships. During the month of June resident nights increased by 26% and non-resident nights by 10% compared to the same month in 1999.

Likewise in Germany the world fair stimulated resident demand, increasing by 6.7% during the first 6 months, with fairly constant monthly growth rates; to result in an increase of 5.7% for the first 11 months of 2000. Non resident nights increased by 8.6% over the six month period and culminated in an 11.2% increase for the period January to November 2000. In Italy the Jubilee festivities may in part have contributed to the 4.3% rise in resident nights and 3.3% increase in non-resident nights for the first 6 months of 2000. In France and Spain resident nights increased by 3.5% and 2.7% respectively for the same reference period. Non resident nights in France grew by 8.8%, but in Spain fell by 2.7%. In Austria, resident nights rose by 6.7% and non-resident nights by 2%.

Perhaps due to the millennium celebrations the last quarter of 1999 showed particularly strong increases in travel receipts and expenditures compared to the same period in 1998, with an increase of 13.3% and 12.2% respectively. Figures for the first quarter of 2000 show a positive growth rate of 9.2% for international travel receipts and 13.9% for expenditures compared to the same period in 1999, resulting in small deficit.



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Tourism flows up by 4.4%

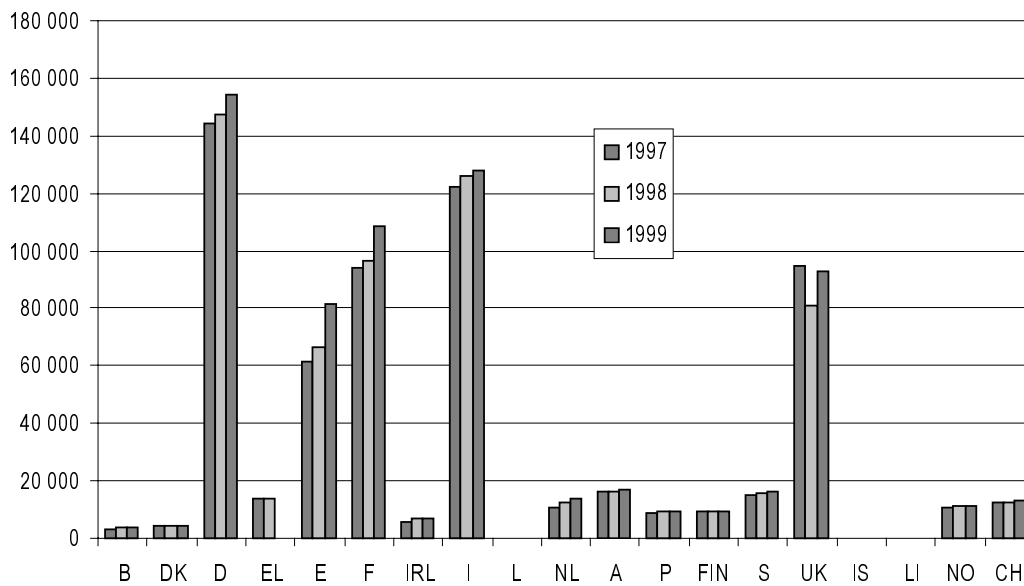


Figure 2: Nights spent by residents in hotels and similar establishments ('000s)

In 1999 tourism flows in the EU in terms of total nights spent in hotels and similar establishments amounted to nearly 1.23 billion. Domestic tourism accounted for more than 54%, the remainder to inbound tourism. Resident nights stays were over 661 million, while non-resident nights amounted to 564 million.

Tourist demand grew in 1999 by 4.4% in EU countries compared to 1998 (excluding Spain due to

changes in methodology). This was driven by a strong demand in resident guest flows in hotels and similar establishments which increased by 6.7% and by non-resident nights which grew by only 1.3%. The trends in 1999 are quite different from the lower annual growth rates recorded in 1998, which had been in contrast driven by demand from non resident tourists (+4.1%). In 1998 total nights spent in hotels and similar had increased by merely 2.5%.

The highest annual increase of resident nights were recorded by the United Kingdom (+14.7%) and France (+12.5%). The countries registering the highest number of resident overnight stays in 1999 were still Germany, Italy, France, United Kingdom and Spain.

Regarding non resident overnight stays, Spain recorded the highest number, followed by Italy and France.

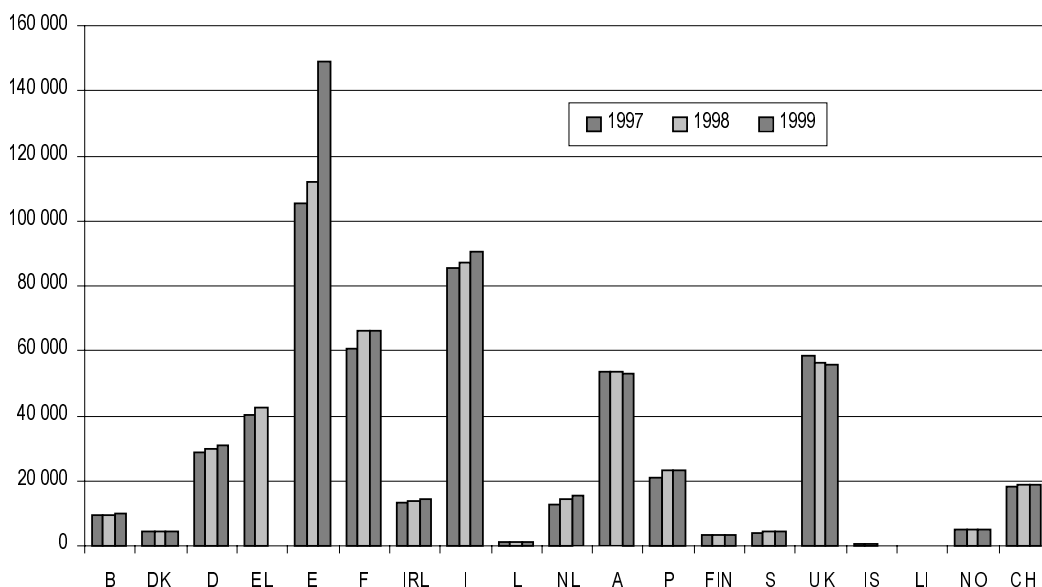


Figure 3: Nights spent by non-residents in hotels and similar establishments ('000s)

Table 1: Nights spent by residents and non-residents in hotels and similar establishments and other collective accommodation

('000s)	Nights spent by residents						Nights spent by non residents					
	Hotels and similar establishments			Other collective accommodation establishments, total ⁽²⁾			Hotels and similar establishments			Other collective accommodation establishments, total ⁽²⁾		
	1998	1999	% 99/98	1998	1999	% 99/98	1998	1999	% 99/98	1998	1999	% 99/98
B	3 498	3 652	4.4%	9 687	9 460	-2.3%	9 483	9 749	2.8%	5 356	5 617	4.9%
DK	4 339	4 417	1.8%	10 543	10 829	2.7%	4 462	4 350	-2.5%	5 825	5 616	-3.6%
D	147 274	154 419	4.9%	89 094	91 423	2.6%	29 735	30 913	4.0%	7 356	7 602	3.3%
EL	13 984	:		469	:		42 565	:		717	:	
E	66 552	81 504	22.5%	13 442	14 374	6.9%	111 803	149 036	33.3%	9 193	11 388	23.9%
F	96 696	108 774	12.5%	62 153	62 512	0.6%	66 330	66 330	0.0%	33 013	37 071	12.3%
IRL	6 667	6 938	4.1%	2 305	2 098	-9.0%	13 712	14 327	4.5%	3 339	3 714	11.2%
I	126 178	128 238	1.6%	52 088	53 409	2.5%	87 192	90 236	3.5%	34 050	36 432	7.0%
L	81	67	-17.1%	184	187	2.0%	1 089	1 136	4.3%	1 206	1 297	7.5%
NL	12 622	13 829	9.6%	39 127	41 994	7.3%	14 262	15 224	6.7%	10 311	12 251	18.8%
A	16 483	17 241	4.6%	7 944	8 225	3.5%	53 503	53 123	-0.7%	9 697	10 708	10.4%
P	9 164	9 397	2.5%	6 162	6 846	11.1%	23 241	23 331	0.4%	2 032	1 749	-13.9%
FIN	9 494	9 600	1.1%	2 132	2 204	3.4%	3 226	3 271	1.4%	475	503	6.0%
S	15 643	16 192	3.5%	13 825	15 062	8.9%	4 409	4 516	2.4%	3 620	4 085	12.9%
UK	81 093	93 000	14.7%	83 890	94 830	13.0%	56 299	55 794	-0.9%	:	:	
IS	309	:		197	:		791	:		198	:	
LI	3	:		11	:		120	:		40	:	
NO	11 252	11 319	0.6%	5 261	5 309	0.9%	5 168	5 208	0.8%	2 701	2 607	-3.4%
CH	12 670	13 134	3.7%	22 887	22 343	-2.4%	18 712	18 544	-0.9%	13 525	13 319	-1.5%

⁽¹⁾ Includes 1 star hotels in 1999

⁽²⁾ Only camping sites for Spain and France

Top tourism generating countries

Intra EU flows account for 73% of total nights spent by non-residents in hotels and similar establishments in the EU.

Germany remains the top tourism generating country for the other EU countries accounting for nearly 27% of total nights spent by non-residents in hotels and similar establishments in the EU. The United Kingdom with 17%, and the Netherlands and France with both 5% are also among the top generating countries. These four countries together account for more than half of the total inbound tourism to the EU.

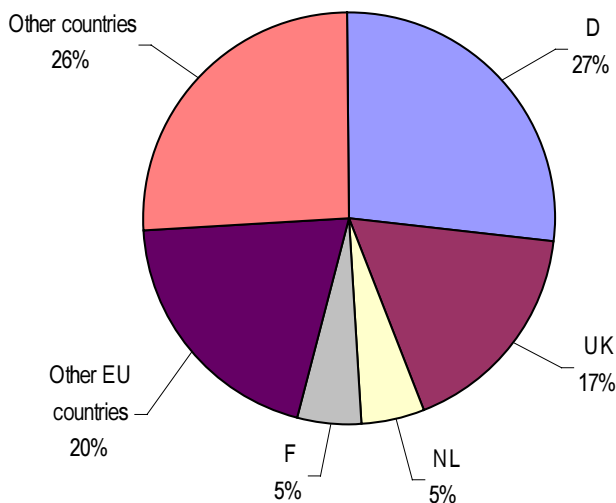


Figure 4: Main tourism generating countries in EU15 destinations, 1999

In terms of market analyse, most of the EU countries have as top tourism generating country either Germany or United Kingdom. German tourists account for 61% of the nights spent by non-residents in Austria, 35% in Spain, 34% in Greece and in Italy. The United Kingdom is Ireland's, Portugal's and the Netherlands first tourism generating market representing

respectively 51%, 29% and 22% of the nights spent by non-residents in these countries. British tourists represent also the first tourism market for Belgium and France.

For the United Kingdom and Germany, on the other hand, the top tourism generating market is the USA, representing respectively 24%

and 13% of non-resident nights to these countries. For the other EU countries, it can be noted that Sweden is Denmark's (with 25%) and Finland's (with 13%) first market. And Norway is Sweden's first market with 14%. For Luxembourg, Belgian tourists represent the first market (26%).

Table 2: Main tourism generating countries, 1999

Countries	1 st market		2 nd market		3 rd market		4 th market		% Top four markets
	Country	%	Country	%	Country	%	Country	%	
EU-15	D	26.8	UK	16.9	NL	4.8	F	4.7	53.2
EUR-11	D	29.0	UK	19.0	NL	4.9	I	4.6	57.5
B	UK	21.3	NL	15.9	F	13.4	D	13.7	62.0
DK	S	25.6	NO	15.9	D	11.1	UK	8.7	61.3
D	USA	13.3	NL	10.5	UK	10.3	I	6.4	41.0
EL	D	34.1	UK	14.0	I	6.1	A	5.7	59.9
E	D	35.1	UK	27.2	F	5.6	B	4.5	73.0
F	UK	20.5	USA	12.5	D	12.0	I	11.3	56.2
IRL	UK	51.0	USA	21.0	D	5.4	F	3.2	80.6
I	D	33.9	USA	9.7	UK	8.2	FR	6.4	58.1
L	B	26.2	D	13.8	NL	13.7	F	9.8	64.0
NL	UK	21.7	D	19.1	USA	12.7	F	5.1	58.6
A	D	60.8	NL	6.5	UK	4.6	I	4.1	76.0
P	UK	29.5	D	22.0	NL	7.5	E	7.4	66.4
FIN	S	13.6	D	11.6	UK	9.5	NO	4.3	39.0
S	NO	13.8	D	13.1	UK	9.7	USA	8.1	44.7
UK	USA	23.9	D	9.6	F	6.5	NL	4.7	44.7
IS	D	20.6	UK	12.2	USA	10.8	SE	8.1	51.7
LI	D	37.3	CH	22.8	A	4.2	UK	3.6	67.9
NO	D	17.0	DK	16.1	S	13.1	UK	10.4	56.6
EEA	D	26.7	UK	16.8	NL	4.8	F	4.7	53.0
CH	D	33.9	USA	10.1	F	6.0	I	5.1	55.0

Note: Figures based on overnights spent in hotels and similar establishments and last year available

Euro-zone international travel surplus up by 29%

The quarterly figures for 1999 continued the 1998 trend with solid increases in receipts and even more so of expenditures, leading to a negative growth rate of the net EU travel account for all quarters of 1999, except the second (+11% compared to the second quarter 1998). The third quarter represents a third of the total travel receipts and expenditures of the year. Despite an increase of 6.4% of travel receipts during the summer quarter, expenditures rose more quickly (7.3%).

In 1999, EU quarterly receipts amounted to Euro 171.9 billion and expenditures to Euro 168.7 billion giving a surplus of Euro 3.2 billion for the EU international travel account, and indicating the predominance of intra EU tourism. In fact, for the year 1999 as a whole the EU experienced a higher growth rate of expenditures compared to receipts.

Expenditures grew by 9.4% while

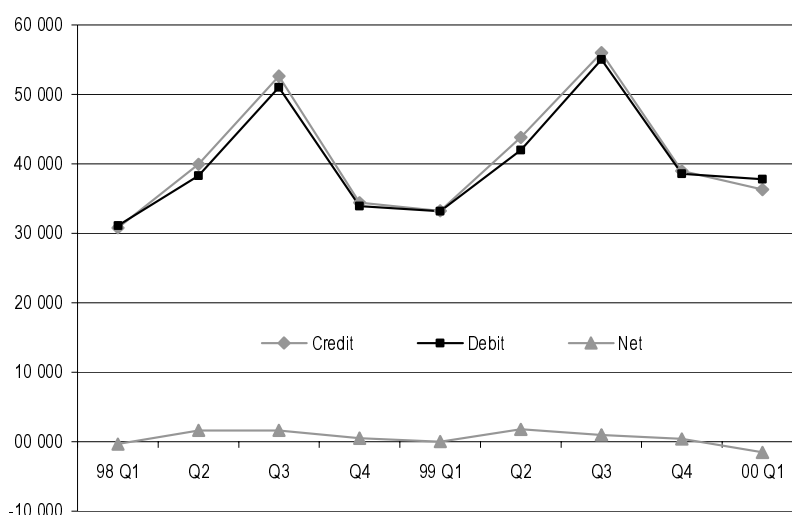


Figure 5: EU Travel Item in the Balance of Payments (Mio Euro)

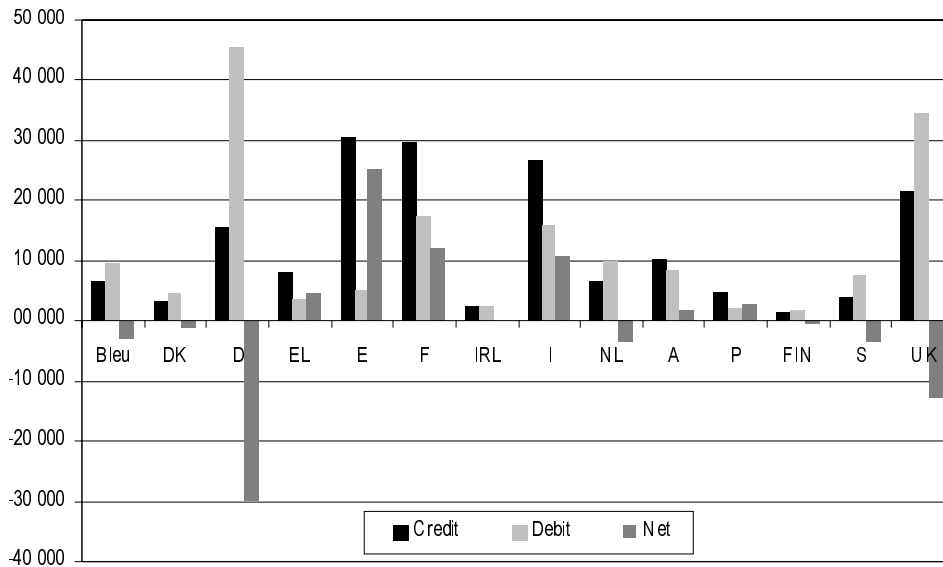
receipts only rose by 9.0% leading to a negative rate for the net account of -6.9%. Nevertheless, figures of the Euro-zone are quite different. Receipts and expenditures grew respectively by 8.2% and 5.9% leading to a rise of the surplus of 28.9% (Euro 16.2 billion).

In 1999, with more than Euro 25

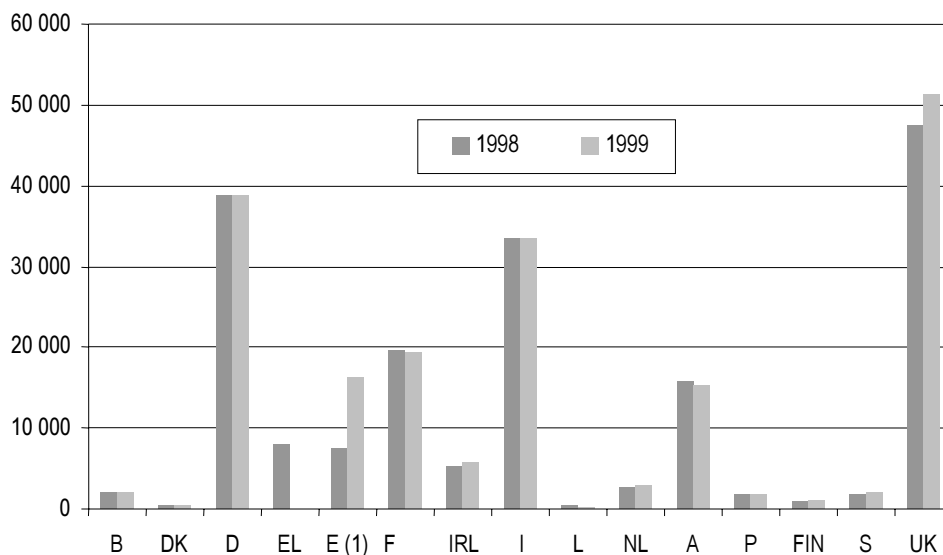
billion, Spain recorded the largest tourism foreign trade surplus, followed by France (Euro 12 billion) and Italy (Euro 10 billion).

On the other hand, Germany recorded the largest deficit (nearly Euro 28 billion), followed by the United Kingdom (nearly Euro 13 billion).

Figure 6: EU Travel Item in the Balance of Payments (Mio Euro)



Accommodation structure



Note : (1) 1999 data include 1star hotels

Figure 7: Number of hotels and similar establishments

In 1999, the total number of hotels and similar establishments amounted to over 198,000 in the EU, accounting for 9.5 million bed-places.

Compared to 1998 the number of hotels and similar establishments grew in EU countries by 1.6% (excluding Spain due to changes in methodology). The main part of this increase was due to the United

Kingdom (7.9%) and to a lesser degree to Ireland (4.2%), and Finland (2.7%). Some EU countries experienced decreases, notably Luxembourg (-5%) and Austria (-2.5%).

In accordance with the rise in the number of hotels and similar establishments, their bed-places were also up by 2.2%. Ireland increased its capacity substantially

by 15%, the United Kingdom by 7.3% and Finland by 2.3%.

In 1999 Italy continues to offer, with a capacity of 1.8 million, the highest number of bed-places in hotels and similar establishments of all the EU countries. Four other countries have a capacity of over one million bed-places: Germany, United Kingdom, France and Spain.

Table 3: Capacity of collective tourist accommodation

	Hotels and similar establishments				Other collective accommodation establishments ⁽³⁾			
	Number of establishments		Number of bed-places		Number of establishments		Number of bed-places	
	1998	1999	1998	1999	1998	1999	1998	1999
B	1 998	2 015	116 297	119 365	1 655	1 646	523 388	517 918
DK ⁽¹⁾	467	464	59 772	60 513	627	621	317 760	318 249
D	38 914	38 701	1 546 862	1 561 830	16 486	16 632	1 449 207	1 466 018
EL	7 946	:	584 834	:	340	:	97 280	:
E ⁽²⁾	7 539	16 229	979 325	1 299 021	:	:	:	:
F	19 555	19 379	1 451 129	1 485 863	9 169	9 140	2 979 209	2 977 325
IRL	5 460	5 692	117 163	135 473	2 525	2 540	58 564	54 706
I	33 540	33 379	1 782 382	1 807 275	35 991	36 822	1 792 494	1 816 616
L	342	325	14 709	14 449	320	297	52 638	50 803
NL	2 788	2 826	169 078	169 749	3 502	3 595	957 271	965 322
A	15 780	15 378	584 889	576 602	5 207	5 290	323 692	328 222
P	1 754	1 772	215 572	216 828	233	244	268 765	268 455
FIN	978	1 004	112 289	114 892	537	524	34 230	33 709
S	1 891	1 898	184 545	184 970	1 601	1 602	66 823	67 287
UK	47 532	51 300	1 096 484	1 176 490	11 237	:	1 759 673	:
IS	253	:	12 030	:	294	:	:	:
LI	52	:	1 385	:	83	:	:	:
NO	1 176	1 162	137 188	137 653	1 235	1 212	116 984	59 340
CH	5 890	5 826	260 290	260 592	94 073	94 081	811 399	812 241

(1) Only establishments with 40 bed-places or more

(2) 1999 data include 1star hotels (3) Only camping sites for Spain and France

Occupancy rates in hotels and similar establishments

With an average annual rate of 42%, the net use of bed-places in hotels and similar establishments in the EU was stable in 1999. In regards of seasonal occupancy, the summer season notably July and August recorded the highest rates with respectively 54% and 55% net occupancy of bed-places. The lowest rates were observed in January and in December with roughly 30%.

Spain was the country with the highest net occupancy rate (59%) directly followed by France (58%). The lowest rate of occupancy occurred in Luxembourg with 25% followed by Germany and Belgium with 33% each.

With a rise of three points Netherlands appeared as the country that has improved the most

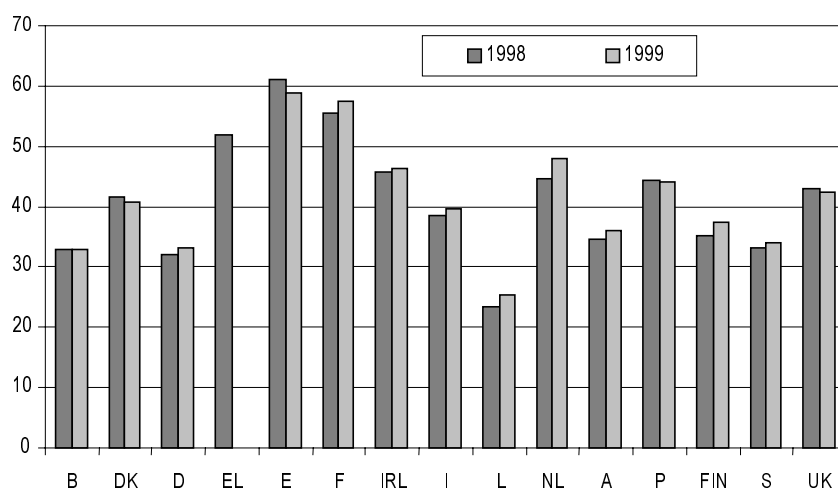


Figure 8: Net use of bed-places in hotels and similar establishments (%)

its annual average net occupancy rate. But for most the countries, the annual rate did not fluctuate much. The seasonal patterns, of course, vary greatly attaining for countries like Spain, France, Greece and Denmark a net occupancy rate of over 65% during July and August.

Table 4 : % Net use of bed-places in hotels and similar establishments, 1999

Countries	January	February	March	April	May	June	July	August	September	October	November	December
B	22.0	28.2	29.5	30.1	37.4	34.8	40.5	40.3	37.9	35.4	31.2	27.3
DK	26.1	30.7	34.1	35.6	43.7	50.2	66.8	55.5	45.2	38.3	38.7	25.3
D	22.0	26.7	26.7	29.7	37.2	38.4	39.5	43.1	44.0	37.9	27.7	25.0
EL	:	:	:	:	:	:	:	:	:	:	:	:
E	44.6	50.8	54.5	58.6	60.3	65.0	70.6	78.0	70.9	61.2	50.5	41.9
F	44.0	48.6	53.6	54.5	60.7	66.5	65.6	70.8	68.2	60.0	51.6	46.2
IRL	27.0	37.0	38.0	44.0	52.0	56.0	61.0	64.0	54.0	52.0	39.0	32.0
I	28.8	32.8	32.2	35.3	37.9	47.4	59.2	69.4	49.5	35.4	24.1	23.0
L	18.2	21.1	21.3	25.0	29.4	28.1	30.0	32.4	28.5	26.9	24.9	19.3
NL	34.0	40.0	42.0	53.0	54.0	52.0	56.0	62.0	53.0	49.0	44.0	37.0
A	45.4	54.7	39.5	24.8	26.4	32.6	44.0	55.0	36.1	25.1	19.1	30.6
P	26.1	33.8	39.8	44.7	47.2	51.0	56.9	67.1	56.1	46.3	33.5	24.9
FIN	30.2	36.7	40.2	37.9	33.4	40.0	49.1	40.2	39.4	35.6	35.8	30.3
S	23.0	30.0	32.0	32.0	33.0	38.0	51.0	41.0	37.0	34.0	33.0	25.0
UK	27.0	34.0	36.0	40.0	45.0	49.0	54.0	57.0	52.0	46.0	38.0	31.0

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

Tourism

The activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes. In relation to a given country, three forms of tourism can be distinguished:

(i) Domestic tourism comprises the activities of residents of a given country travelling to and staying in places only within that country but outside their usual environment;

(ii) Inbound tourism comprises the activities of non-residents of a given country travelling to and staying in places in that country and outside their usual environment;

(iii) Outbound tourism comprises the activities of residents of a given country travelling to and staying in places outside that country 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.

Similar establishments

Comprise rooming and boarding houses, tourist residence 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 establishments

The accommodation establishment conforms to the definition of local unit as the production unit. This is irrespective of whether the accommodation of tourists is

the main or secondary activity. This means that all establishments are classified in the accommodation sector if their capacity exceeds the national minimum even if the major part of turnover may come from restaurant or other services.

Number of bed-places

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 (dwelling), ignoring any extra beds that may be set up by customer request.

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.

Net use of bed-places

The net occupancy rate of bed-places in one month is obtained by dividing total overnight stays by the product of the bed-places on offer and the number of days when the bed-places are actually available for use (net of seasonal closures and other temporary closures for decoration, by police order, etc.) for the same group of establishments, multiplying the quotient by 100 to express the result as a percentage.

Further information:

➤ Reference publications

Title Tourism in Europe
 Catalogue No CA-23-99-031-EN-C Price EUR 7

➤ Databases

New Cronos, Domain Tourism

To obtain information or to order publications, databases and special sets of data, please contact the **Data Shop** network:

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