

## Tourism trends in Europe and in Mediterranean Partner Countries, 2000-2006

Tourism is a growth industry in Europe and in the Mediterranean region. Between 2000 and 2006, the annual number of nights spent by tourists<sup>1</sup> increased faster in the Mediterranean Partner Countries<sup>2</sup> (MPC) (8.4%) than in the EU-27 (1.0%) and EFTA countries (0.6%).

Over the same period, tourist arrivals at the MPC borders increased by 9.5% per year on average, reaching 57.6 million in 2006. In the EU-27, arrivals of non-residents to hotels and similar establishments grew by 2.1% per year on average, reaching 211.9 million arrivals in 2006.

In the MPC, the number of bed places in hotels and similar establishments grew by 6.1% per year on average, reaching 1.6 million in 2006; in the EU-27, the average annual rate of growth for this indicator was 1.8%, resulting in 11.5 million bed places in the same year.

From 2002 to 2005, the tourism balance of payments surplus in the MPC grew steadily; in the EU-27 the tourism balance of payments fell during the period 2000-2003, recovering sharply by 2006.

### Tourism is expanding both in European and in Mediterranean Countries

Table 1: Key tourism figures for the MPC, the European Union and EFTA countries

	Nights spent in hotels & similar establishments		No. of bed places in hotels and similar establishments	
	2006 (thousands)	Average annual growth rate, 2000-2006	2006 (thousands)	Average annual growth rate, 2000-2006
MPC <sup>1</sup>	189 781 <sup>2</sup>	8.4	1 577 <sup>3</sup>	6.1
EU-27 <sup>1</sup>	1 524 991	1.0	11 536	1.8
Mediterranean countries of the EU-27 <sup>1,4</sup>	796 190	1.2	5 809	2.0
EFTA countries <sup>1</sup>	53 357	0.6	429	0.8

<sup>1</sup> Includes Eurostat estimates. <sup>2</sup> Excludes Turkey and Lebanon. <sup>3</sup> Excludes Lebanon. <sup>4</sup> EU Mediterranean countries are Greece, Spain, France, Italy, Cyprus, Malta and Slovenia.

<sup>1</sup> For definition of tourist, see methodological notes at end of the document.

<sup>2</sup> MPC = Algeria (DZ), Egypt (EG), Israel (IL), Jordan (JO), Lebanon (LB), Morocco (MA), occupied Palestinian territory (PS), Syria (SY), Tunisia (TN) and Turkey (TR).

As Table 1 shows, tourism in the MPC, as a whole, and in the EU-27 grew between 2000 and 2006. The number of nights spent in hotels and similar establishments increased considerably in the MPC over the period: 8.4% per year on average, to reach 189.8 million in 2006. For the EU-27 and EFTA countries, the number of nights spent in hotels and similar establishments increased by 1.0% and 0.6% per year on average, reaching 1 525 million and 53.4 million nights respectively. The EU Mediterranean countries account for 52.2% of the total number of nights spent in EU-27 hotels and similar establishments and have shown a marginally higher average annual growth rate for the period (1.2%).

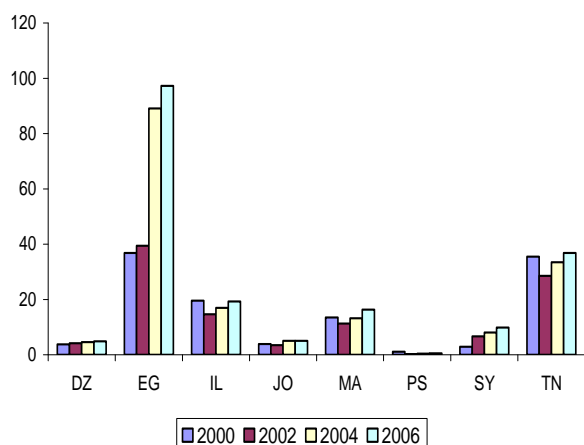
The data indicate that the general occupancy rates for hotels in the MPC have increased: average

growth in the number of nights spent in hotels and similar establishments slightly exceeds the average growth in the number of bed places. These increased by 6.1% per year on average for the period, to 1.6 million bed places in 2006.

In the EU-27, a different picture emerges: between 2000 and 2006 the number of bed places grew by 1.8% per year on average, exceeding the growth in the number of nights spent in hotels and similar establishments (1.0%), and suggesting a slight decline in the occupancy rates. For the EFTA countries the same was true, a slightly higher increase of the number of bed places (0.8% on average per year) compared to the number of nights spent (0.6%) resulting in a marginal decrease of the occupancy rates.

## Growth in the number of nights spent in hotels and similar establishments

**Figure 1: Number of nights spent by residents and non-residents in hotels and similar establishments in the MPC<sup>1,2</sup>, in million, 2000-2006**

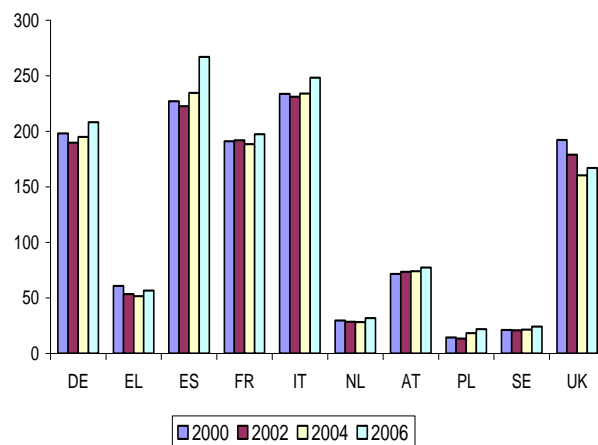


<sup>1</sup> Includes Eurostat estimates. <sup>2</sup> Excludes Turkey and Lebanon.

As shown in Figure 1, in 2006 Egypt accounted for 51.2% of all nights spent in hotels and similar establishments in the 8 MPC for which data are available, followed by Tunisia (19.4%), Israel (10.2%), Morocco (8.6%) and Syria (5.2%). Together Jordan (2.6%), Algeria (2.5%), and the occupied Palestinian territory (0.2%) make up less than 6% of the total.

Syria reported the highest growth in nights spent in hotels and similar establishments (an average of 22.3% annually between 2000 and 2006). Egypt has also shown considerable growth for this indicator (17.6%), followed at a distance by Jordan (4.6%), Algeria (4.4%) and Morocco (3.2%). For Tunisia and Israel, the number of nights spent in hotels and similar establishments remained relatively stable for the same period, whereas in

**Figure 2: Number of nights spent by residents and non-residents in hotels and similar establishments in the Top Ten Destination countries of the EU-27<sup>1</sup>, in million, 2000-2006**



<sup>1</sup> Top 10 destinations based on 2006 data.

the occupied Palestinian territory it fell by an annual average of 13.2%.

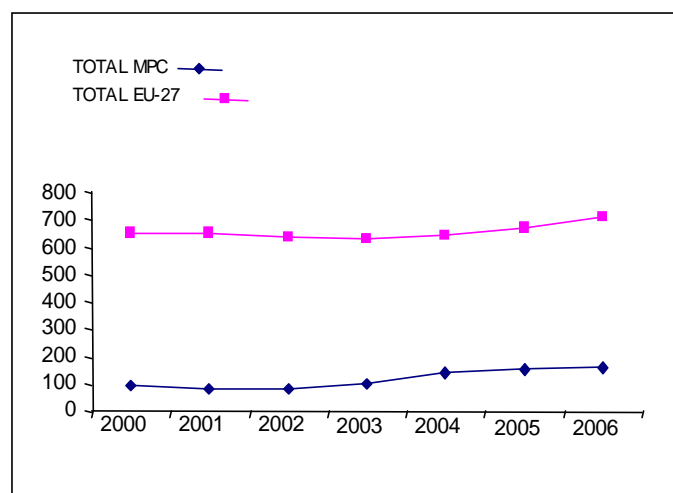
In the EU-27, the Mediterranean countries, Spain, Italy, and France together accounted for 46.7% of the EU total nights spent in hotels and similar establishments in 2006. This has grown slightly compared to 2000, when the same three countries accounted for 45.3% of the EU total.

The EU's top ten tourist destinations together account for 85.2% of the total number of nights spent in hotels and similar establishments in the EU-27. Spain (17.5%) and Italy (16.3%) take the lead, followed by Germany (13.7%), France (12.9%), and the United Kingdom (10.9%). Austria and Greece account for 5.1% and 3.7% respectively, while the Netherlands, Sweden and Poland range from 2.1% to 1.4% of the EU-27 total.

Among the EU-27, the newer Member States recorded above average annual growth in the number of nights spent in hotels and similar establishments between 2000 and 2006: Lithuania (18.0%), Estonia (14.0%), Bulgaria (12.1%), Latvia (11.3%), Poland (7.3%) and Slovakia (3.9%). This contrasts with an average annual growth rate of 2.7% in Spain and a slight decline in the United Kingdom and Greece (-2.3% and -1.2% annually respectively) over the same period.

Non-residents accounted for 83.1% of all nights spent in hotels and similar establishments in the MPC in 2006, compared to 46.2% in the EU-27. Furthermore, during the period 2000-2006, the total number of nights spent in hotels and similar establishments by non-residents in the MPC has grown much faster than the EU-27 (9.2% and 1.3% respectively per year on average).

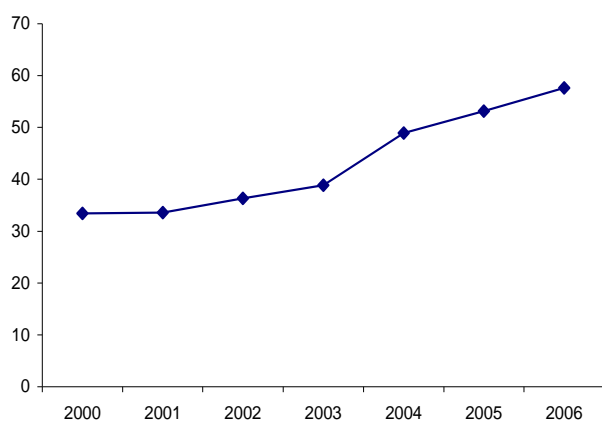
**Figure 3: Nights spent by non-residents in hotels and similar establishments in the MPC<sup>1,2</sup> and EU-27<sup>1</sup>, in million, 2000-2006**



<sup>1</sup> Includes Eurostat estimates. <sup>2</sup> Excludes Turkey and Lebanon.

### Increase in tourist arrivals in the MPC and the EU-27, 2000-2006

**Figure 4: Tourist arrivals at borders in the MPC<sup>1</sup>, in million, 2000-2006**

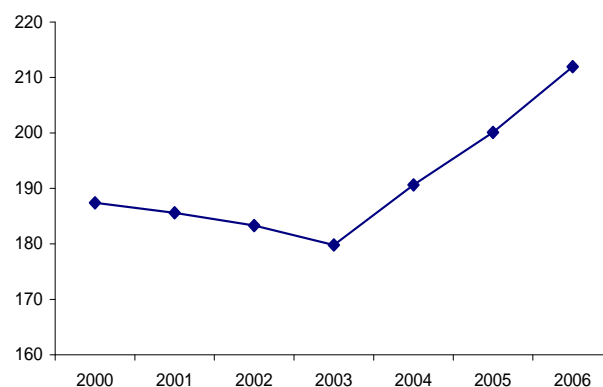


<sup>1</sup> Excludes Lebanon and occupied Palestinian territory. Some years include Eurostat estimates for Jordan, Morocco and Turkey.

The number of tourists arriving annually at the borders of the MPC has also grown dramatically, from 33.4 million in 2000 to 57.6 million in 2006, with an average growth rate of 5.1% per year between 2000 and 2003, and 14.0% per year for the period 2003-2006.

The largest increase was registered in Turkey with an annual average growth rate of 14.0% between 2000 and 2006, followed by Syria (12.2%), Algeria (11.2%), Egypt (8.7%), the occupied Palestinian territory (8.2%), Morocco (7.7%) and Tunisia (4.4%). Israel suffered a sharp drop in 2001 (-50.5%), and, although tourists are returning, the level in 2006 was still well below 2000.

**Figure 5: Tourist arrivals by non-residents to hotels and similar establishments in the EU-27<sup>1</sup>, in million, 2000-2006**



<sup>1</sup> Excludes Ireland and Romania. Some years include Eurostat estimates for Lithuania and Malta.

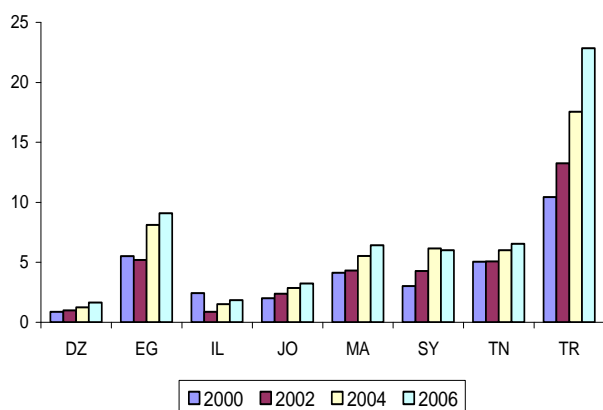
In the EU-27, the number of non-resident tourists arriving at hotels and similar establishments fell by an average of 1.4% annually between 2000 and 2003. This was followed by a strong recovery between 2003 and 2006, with an annual average growth rate of 5.6%, reaching 211.9 million in 2006 compared to 187.4 million in 2000.

Among the EU's top ten destinations, the highest annual average growth for this indicator between 2000 and 2006 was recorded for Poland (6.9%), followed by Spain (4.0%), Germany (3.6%), Italy and Sweden (both 2.6%), Austria (2.0%), the Netherlands (1.7%) and the United Kingdom (1.6%). On the other hand, non-resident arrivals to Greek and French hotels and similar

establishments declined over the same period (by an annual average of -0.5% and -1.9% respectively).

Although the two variables (annual tourist arrivals at borders in the case of the MPC and to hotels and similar establishments for the EU-27) are not directly comparable, the contrast in the trends highlights the dynamics of tourism flows in the two

**Figure 6: Annual tourist arrivals at borders in the MPC<sup>1</sup>, in million**

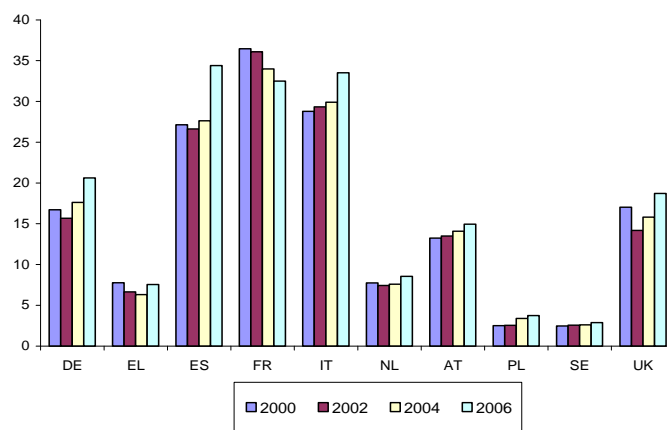


<sup>1</sup> Excludes Lebanon and occupied Palestinian territory. Some years include Eurostat estimates for Jordan, Morocco and Turkey.

regions. In both cases, 2003 represents a turning point at which both indicators improved.

For the MPC, the average length of stay in the country remained relatively stable between 2000 and 2006, at 3.3 days in 2006. In the EU-27, the average length of stay in hotels and similar establishments in 2006 was 2.7 days, and was also relatively stable over the reference period.

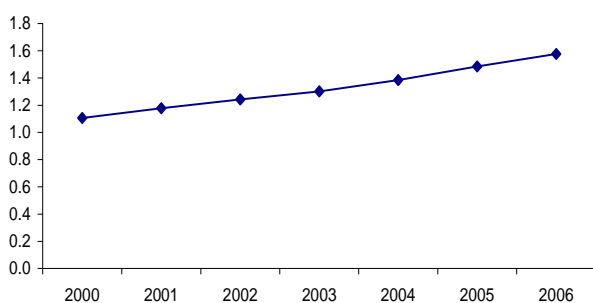
**Figure 7: Annual arrivals of non-resident tourists to hotels and similar establishments in the top 10 EU<sup>1</sup> tourist destinations, in million**



<sup>1</sup> Excludes Ireland and Romania. Some years include Eurostat estimates for Lithuania and Malta.

## More bed places available in hotels and similar establishments in the MPC and the EU-27

**Figure 8: Number of bed places in hotels and similar establishments in the MPC<sup>1</sup>, in million, 2000-2006**

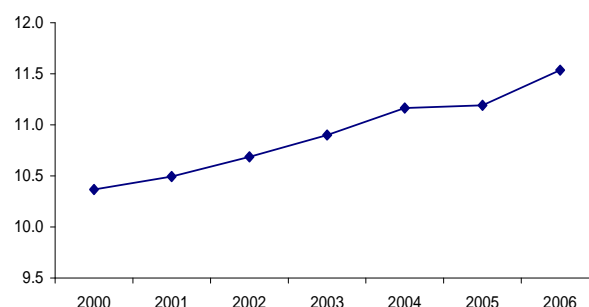


<sup>1</sup> Excludes Lebanon.

There has been a marked increase in the number of bed places in hotels and similar establishments in both regions since 2000. In the MPC, the number of bed places in 2006 was estimated at 1.6 million, representing an average annual growth rate of 6.1% between 2000 and 2006.

The largest increases were reported in Turkey and Egypt (9.0% and 8.6% respectively per year on average), followed by Morocco (5.8%), Syria (5.2%), Jordan (3.6%), Tunisia (2.8%), Algeria (1.7%) and Israel (1.1%). In contrast, the figures for the occupied Palestinian territory show an annual

**Figure 9: Number of bed places in hotels and similar establishments in the EU-27<sup>1</sup>, in million, 2000-2006**



<sup>1</sup> Includes Eurostat estimates.

decline of -3.7% on average between 2000 and 2006.

In the EU-27, the number of bed places grew by an average of 1.8% annually for the period 2000-2006, reaching an estimated 11.5 million. The greatest increases occurred in some of the new EU Member States: Lithuania (11.0%), Bulgaria (9.7%), Latvia (8.7%), Estonia (8.1%), Poland (6.8%) and Slovakia (4.8%). These countries outperformed the European Mediterranean destinations, such as Spain (3.5%), Greece (2.2%) and Italy (2.0%).

**Table 2: Number of bed places in hotels and similar establishments<sup>1</sup> in the MPC<sup>2</sup>, in thousand, 2000-2006**

	2000	2001	2002	2003	2004	2005	2006
DZ	76	72	76	77	82	83	84
EG	227	241	264	273	296	342	<b>371</b>
IL	107	114	113	114	115	115	114
JO	34	37	37	38	39	40	42
LB	:	:	:	:	:	:	26
MA	95	97	102	110	119	124	133
PS	10	6	6	7	8	8	8
SY	34	35	35	39	40	43	46
TN	197	206	214	222	226	230	232
TR	325	369	396	421	<b>459</b>	<b>501</b>	<b>546</b>

<sup>1</sup> Figures in italics are estimates. <sup>2</sup> Excludes Lebanon.

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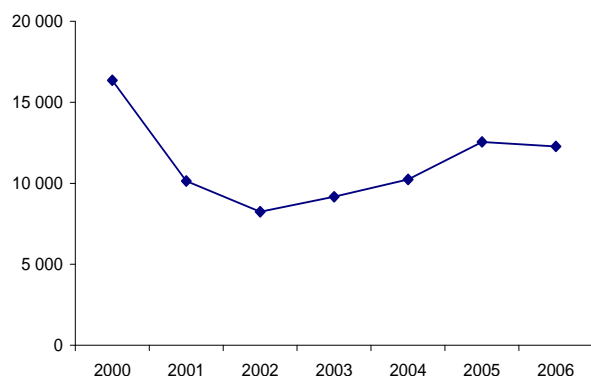
**Table 3: Number of bed places in hotels and similar establishments in the top ten destinations of the EU-27<sup>1</sup>, in thousand, 2000-2006**

	2000	2001	2002	2003	2004	2005	2006
DE	1 590	1 603	1 608	1 611	1 609	1 621	1 631
EL	608	608	606	645	668	682	693
ES	1 316	1 333	1 394	1 452	1 512	1 580	1 615
FR	1 214	1 235	1 236	1 241	1 266	1 258	1 254
IT	1 854	1 891	1 930	1 969	2 000	2 028	2 087
NL	173	174	177	180	190	192	192
AT	588	587	569	566	571	571	573
PL	120	118	128	134	165	170	178
SE	188	195	181	185	190	197	201
UK	1 119	1 130	1 188	1 204	1 223	1 062	1 256

<sup>1</sup> Includes Eurostat estimates.

## EU-27 tourism balance of payments bounces back in 2006

**Figure 10: MPC<sup>1</sup> tourism balance of payments, million EUR, 2000-2006**



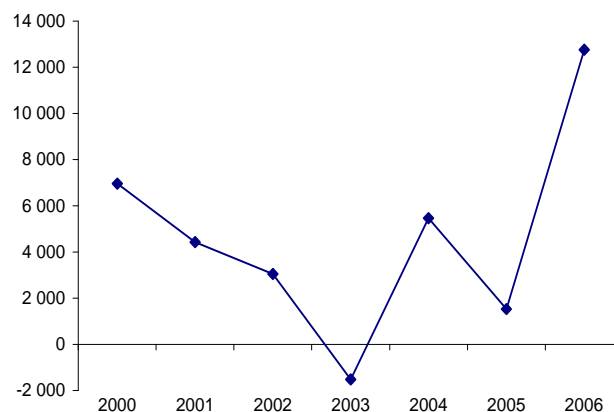
<sup>1</sup> Excludes Syria and Egypt. Some years include Eurostat estimates for Lebanon, Algeria and the occupied Palestinian territory.

The tourism balance of payments represents the difference between tourism inflows or incomes (tourism expenditure of foreigners in the country) and tourism outflows (tourism expenditure of residents abroad). No clear trend is discernable over the period 2000-2006.

In the MPC, with the exception of Egypt and Syria, the tourism balance of payments fell by 29.0% per year on average between 2000 and 2002, recovering during the following 3 years (at an average rate of 15.0% per year). However, by 2005 it had not returned to the 2000 level, and a further downturn was recorded in 2006 (-2.1%).

The EU-27 tourism balance of payments declined continuously from 2000 to 2003, when it even became negative, recovering sharply in 2004 and again in 2006, when the surplus surpassed the level recorded in 2000. The balance stood at a

**Figure 11: EU-27<sup>1</sup> tourism balance of payments, million EUR, 2000-2006**

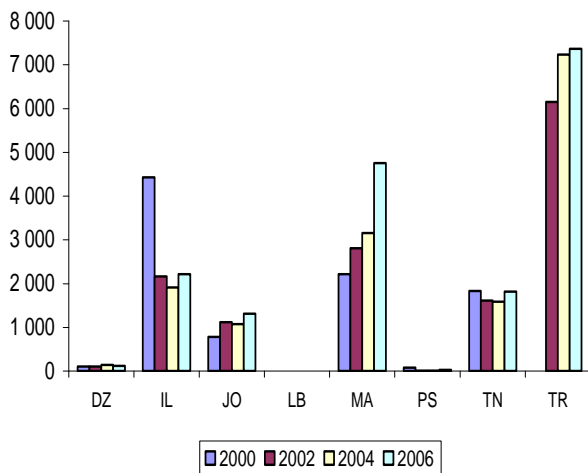


<sup>1</sup> Excludes Luxembourg, Belgium and Romania. Some years include Eurostat estimates for Greece and Malta.

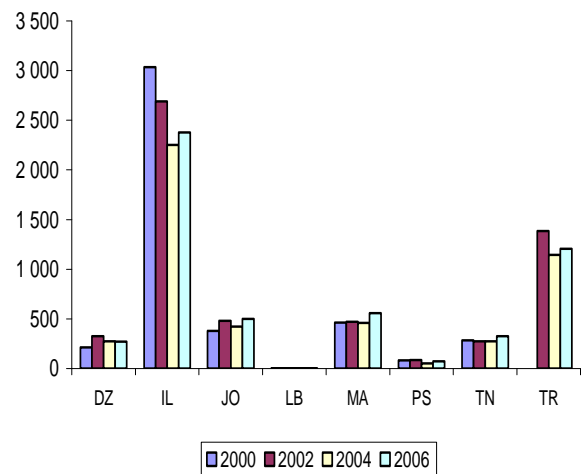
surplus of 12 775 million euro in 2006, slightly higher than the corresponding figure for the MPC (12 280 million euro).

As becomes evident from Figures 12 and 13, the trends of tourism receipts (the expenditure made by non residents in the country of reference) and tourism expenditure (the expenditure made abroad by residents of the country of reference) in MPC vary significantly from one country to another. For example, between 2000 and 2006 Morocco increased not only its tourism receipts (with an average annual growth rate of 13.6%, the highest amongst the MPC), but also its expenditure on tourism (3.2%). However, other countries such as Israel recorded negative average annual growth rates in this same period, both for the tourism receipts (-10.9%) and for the tourism expenditure (-4.0%).

**Figure 12: Tourism receipts in the MPC<sup>1</sup>, million EUR, 2000-2006**



**Figure 13: Tourism expenditure by MPC<sup>1</sup>, million EUR, 2000-2006**



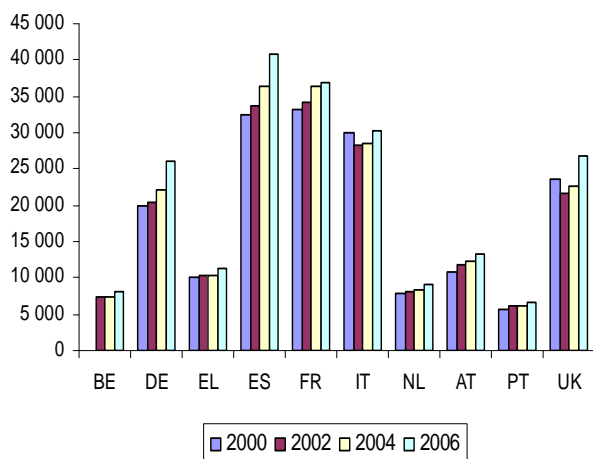
<sup>1</sup> Excludes Syria and Egypt. Some years include Eurostat estimates for Lebanon, Algeria and the occupied Palestinian territory.

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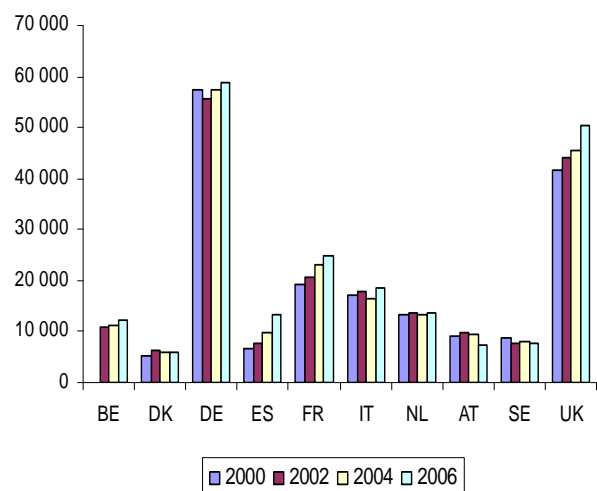
As can be seen in Figure 14, between 2000 and 2006 tourism receipts grew for all of the top-10 tourism exporting EU countries. Tourism receipts in Germany, Spain and Austria recorded the highest annual average growth rates with 4.5%, 3.9% and 3.5% respectively. Over the same period, expenditure on tourism (Figure 15) increased for the 10 EU countries that spent most on tourism, except for Austria and Sweden, where tourism

expenditure fell by -3.6% and -2.2% respectively. Among the EU countries with the largest revenues from tourism in absolute terms in 2006, the highest annual average growth rate of the tourism balance was reported in Austria (24.3%), followed by Greece (9.6%). On the other hand, the Netherlands (-2.6%), France (-2.5%), Germany (-2.2%) and Italy (-1.3%) have all seen their tourism balances fall.

**Figure 14: Tourism receipts in the top EU countries, million EUR, 2000-2006**



**Figure 15: Tourism expenditure by the top EU countries, million EUR, 2000-2006**



## METHODOLOGICAL NOTES

**Sources:** EU data from Eurostat; data for MPCs supplied by national statistical institutes

A tourist is considered as a temporary visitor staying at least one night and less than one year in the country visited for a purpose classified as either holiday (recreation, leisure, sport, and visit to family, friends or relatives), business, official mission, convention, or health reason. For the following countries, the definition is different:

- Algeria: tourists = nationals residing abroad + foreign visitors
- Egypt: tourists = foreign visitors
- Israel: tourists = foreign visitors excluding cruise passengers and excluding Israeli residents living abroad
- Jordan: 2000: tourists = visitors excluding Jordanian citizens living outside Jordan and excluding same-day visitors  
2002-2005: tourists = visitors including Jordanian citizens living outside Jordan and excluding same-day visitors
- Morocco: tourists = nationals residing abroad + foreign tourists, excluding cruise passengers
- Syria: tourists = foreign visitors + foreign residents
- Tunisia: tourists = foreign non-residents (national non residents are not included)
- Turkey: tourists = foreign visitors, including same-day visitors

A night spent is considered as each night that a guest actually spends or is registered in a hotel or similar establishment. For the following countries, there are some particularities:

- Egypt and Turkey: only hotels are considered, not other types of accommodation
- Jordan and Morocco: includes classified and non-classified hotels
- Syria: due to a change in methodology in 2002, the data is not comparable

Concerning the number of bed places, special considerations must be taken into account for the following countries:

- Egypt: only hotels are considered, not other types of collective accommodation
- Jordan and Morocco: includes classified and non-classified hotels
- Tunisia: includes hotels, similar establishments, specialized establishments and campsites
- Israel: total beds in tourist hotels including hotels temporarily closed

### Abbreviations:

DZ:	Algeria	BG:	Bulgaria	CY:	Cyprus
EG:	Egypt	CZ:	Czech Republic	HU:	Hungary
IL:	Israel	DK:	Denmark	NL:	Netherlands
JO:	Jordan	DE:	Germany	AT:	Austria
LB:	Lebanon	IE:	Ireland	PL:	Poland
MA:	Morocco	EL:	Greece	PT:	Portugal
PS:	occupied Palestinian territory	ES:	Spain	SE:	Sweden
SY:	Syria	FR:	France	UK:	United Kingdom
TN:	Tunisia	IT:	Italy		
TR:	Turkey				

This document has been prepared with the co-operation of Mr Fernando Cortina, Tourism short-term expert in MEDSTAT II, the EU-funded regional Euro-Mediterranean Statistical Co-operation programme.

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- Harmonise statistical methods in Mediterranean partner countries in line with European and international conventions and standards.
- Improve the comparability of data between the partner countries and with those from EU Member States and EFTA countries.
- Enhance the quality of services offered to users by the National Statistical Institutes and their partner organizations involved in the production of statistics.

Special attention is paid to **9 sectors**: Trade of goods and services, National accounts, Social statistics, Energy, Agriculture (including Fisheries), Environment, Tourism, Transport and Migration.

The programme currently includes ten partner countries: Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, the occupied Palestinian territory, Syria, Tunisia and Turkey.

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-  Tourism demand : domestic and outbound tourism (excluding day-trips)

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