

## July and August account for one third of all annual nights spent in accommodation establishments in the EU

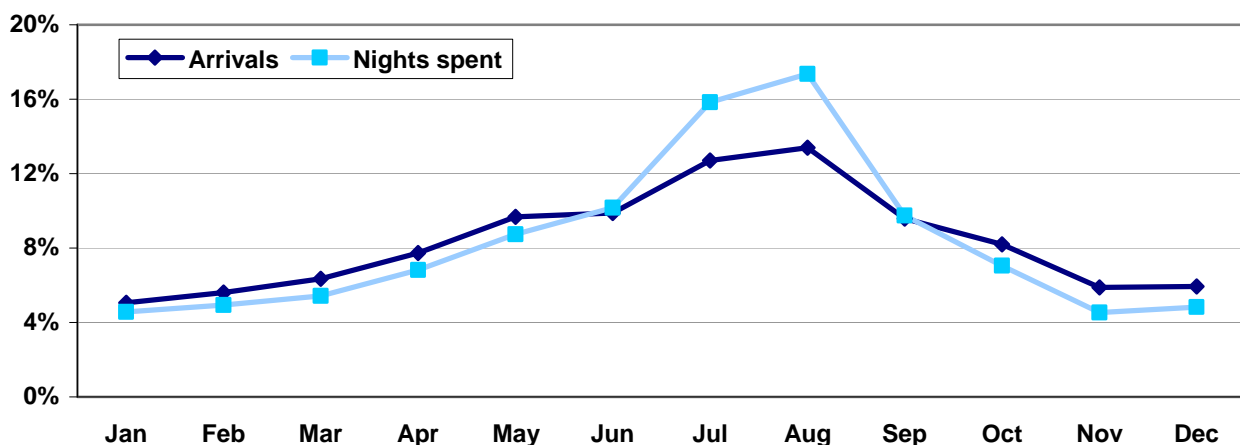
A look at the seasonal bias in the tourism accommodation sector in 2009

In June 2010, the European Commission released a Communication entitled *'Europe, the world's No 1 tourist destination — a new political framework for tourism in Europe'*. One of the challenges and opportunities facing the European tourism industry is the seasonal distribution of demand for tourism. Better use of existing tourist infrastructure and staff in the low season could help businesses improve their productivity and benefit from a more stable and motivated workforce. Extending the tourism season or spreading tourism activities more evenly throughout the year can significantly boost the sustainability and competitiveness of European tourist destinations.

This publication focuses on the tourist accommodation sector and looks at the seasonality of arrivals and nights spent in accommodation establishments and of the employment in this tourism industry. The analysis from the point of view of the supply side complements Statistics in Focus 54/2010 in which the seasonal bias in tourism demand is discussed.

The tourist accommodation sector experiences strong seasonal fluctuations. Nearly one in three nights spent in tourist accommodation establishments during 2009 was recorded in July or August. However, the number of persons employed in this industry appears to vary less.

Figure 1: Monthly distribution of the total number of arrivals and nights spent in collective tourist accommodation, 2009, EU-27



Source: Eurostat ([tour\\_occ\\_arm](#), [tour\\_occ\\_nim](#))

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## Seasonal fluctuations were particularly high in the tourist accommodation sector where 33.2 % of annual nights spent away were recorded in the two peak months, July and August

The monthly accommodation statistics for 2009 showed a significant seasonal bias for arrivals and number of nights spent in tourist accommodation (see Figure 1 and Table 1). The number of arrivals were a bit more evenly spread over the year than the number of nights spent away, mainly due to the concentration of longer stays in July and August. Both figures peaked in August. The number of arrivals in the peak month was 2.6 times higher than the number of arrivals in the slowest month (January) while the number of nights spent was 3.8 times higher in the peak month than in the slowest month (again January). In terms of nights spent, the two summer months accounted for one third (33.2 %) of all nights spent in tourist accommodation in 2009. The period from June to

September represented more than half (53.1 %) of all nights spent away during the year (see also Figure 3).

Seasonality in tourism seemed to be much higher from a supply side perspective (i.e. using accommodation statistics) than from the demand side perspective (see *Statistics in Focus 54/2010*). While the first — by definition — includes only tourism flows into (paid) tourist accommodation, the latter also includes trips where the accommodation was not paid for, such as stays with relatives and friends or stays at owned dwellings (e.g. second residences). These types of trips may be more frequent or regular and therefore less concentrated in the busiest tourism months of the year.

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## In the Alpine countries Austria, Switzerland and Liechtenstein, the seasonal pattern was smoothened as these countries have a second peak season in winter

The overall situation at EU level shown in Figure 1 aggregates data from countries with a very different seasonal profile. For each country, the monthly share in the annual number of nights spent in tourist accommodation is listed in Table 1. The average of the absolute deviations of monthly data points from their mean can be used to measure seasonal variation. It gives an idea of how much the monthly figures deviate from even distribution (i.e. a perfectly even spread of nights spent away over the 12 months of the year).

The eight countries with the highest seasonal variation in 2009 overlap with the set of countries where at least one month took up a share of more than 20 % of the annual nights spent (see Figure 2a), except Cyprus. This group included typical Mediterranean destinations and Scandinavian countries (namely Sweden and Denmark, who both had a particularly high peak in July). However, there was no absolute geographical rule since other countries located in this region showed a much lower seasonal variation.

To put the seasonal pattern of this group in perspective, Figure 2b shows the countries with the lowest seasonal variation. This group included Malta, while the other Mediterranean island state Cyprus showed a more pronounced seasonal

pattern. When comparing the monthly series for these two Member States, they both seemed to have a very important summer season, but the slowdown during the winter was much more pronounced in Cyprus than in Malta (see Table 1). While activity in the winter months for the Maltese accommodation sector was comparable to the European average, the winter scores for Cyprus were the lowest, together with Greece and Croatia.

A particular phenomenon leading to lower seasonality was observed in the Alpine countries Austria, Switzerland and Liechtenstein. When looking at the months with a share above the expected share if the distribution were even (i.e. each month has a share of 8.3 % — or 1/12th of the annual total), these countries appeared to have higher figures in two separate periods of the year. In addition to a peak season during the summer months, these countries had a second peak season during the winter months. To a lesser extent, a similar phenomenon was recorded for Finland and Slovakia. This double peak pattern is clearly depicted in Figure 2c. In Belgium, a second peak season (or local high) was observed during the spring months April and May (followed by a slowdown in June before the summer peak).

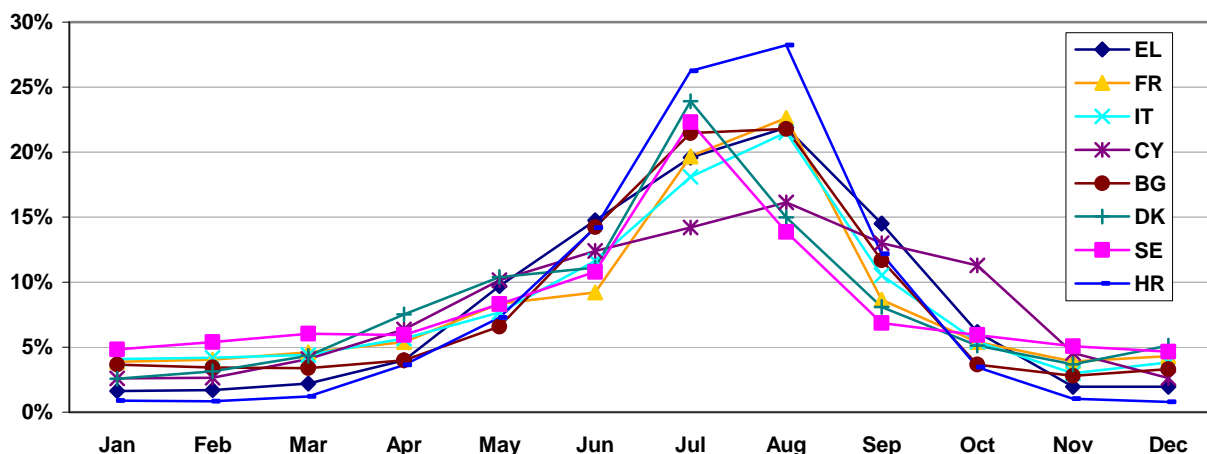
**Table 1: Nights spent in collective tourist accommodation, distribution per month, 2009**

	Nights spent in 2009 (in '000)	Distribution per month											
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>EU-27</b>	<b>2 220 857</b>	<b>4.6%</b>	<b>4.9%</b>	<b>5.4%</b>	<b>6.8%</b>	<b>8.7%</b>	<b>10.2%</b>	<b>15.8%</b>	<b>17.4%</b>	<b>9.7%</b>	<b>7.1%</b>	<b>4.5%</b>	<b>4.8%</b>
<b>BE</b>	29 250	4.1%	5.6%	6.0%	8.8%	9.4%	7.8%	14.9%	14.4%	8.3%	8.3%	6.3%	6.1%
<b>BG</b>	15 277	3.7%	3.5%	3.4%	4.0%	6.6%	14.2%	21.4%	21.8%	11.7%	3.7%	2.8%	3.3%
<b>CZ</b>	36 662	6.0%	6.6%	6.5%	6.9%	8.6%	8.7%	14.4%	14.7%	9.1%	7.5%	5.5%	5.5%
<b>DK</b>	26 525	2.6%	3.1%	4.3%	7.5%	10.4%	11.1%	23.9%	15.0%	8.1%	5.1%	3.7%	5.1%
<b>DE</b>	314 140	4.8%	5.3%	5.9%	7.5%	9.8%	9.9%	12.8%	13.0%	10.3%	9.3%	5.6%	5.7%
<b>EE</b>	4 116	5.6%	5.5%	6.0%	7.2%	8.5%	10.5%	15.6%	12.8%	7.5%	8.1%	6.2%	6.5%
<b>IE</b>	30 450	4.4%	5.1%	6.0%	8.6%	9.2%	11.4%	14.5%	14.5%	9.2%	6.8%	5.0%	5.2%
<b>EL</b>	61 141	1.6%	1.7%	2.2%	4.0%	9.7%	14.8%	19.6%	21.9%	14.5%	6.2%	2.0%	2.0%
<b>ES</b>	349 399	4.6%	5.0%	6.0%	7.5%	8.3%	9.9%	14.0%	16.4%	10.4%	8.0%	5.1%	4.9%
<b>FR</b>	294 659	3.9%	4.0%	4.6%	5.4%	8.3%	9.2%	19.7%	22.6%	8.6%	5.4%	3.9%	4.3%
<b>IT</b>	357 898	4.1%	4.2%	4.4%	5.7%	7.7%	11.6%	18.1%	21.5%	10.5%	5.4%	3.0%	3.8%
<b>CY</b>	12 880	2.6%	2.7%	4.1%	6.4%	10.2%	12.4%	14.2%	16.1%	13.0%	11.3%	4.5%	2.6%
<b>LV</b>	2 543	6.4%	5.8%	6.2%	7.3%	9.1%	10.5%	13.8%	13.0%	8.9%	7.1%	5.6%	6.1%
<b>LT</b>	2 548	5.6%	5.0%	5.4%	6.3%	8.6%	11.5%	15.6%	15.5%	8.7%	7.1%	5.3%	5.4%
<b>LU</b>	2 239	3.9%	4.2%	5.1%	7.9%	10.6%	9.7%	17.7%	17.0%	7.9%	7.1%	5.0%	3.8%
<b>HU</b>	18 553	4.4%	4.3%	5.3%	6.8%	8.8%	10.0%	16.9%	16.7%	8.8%	7.8%	5.4%	4.9%
<b>MT</b>	6 896	4.8%	5.6%	6.3%	7.9%	8.4%	9.6%	12.9%	13.9%	10.6%	9.4%	5.8%	4.6%
<b>NL</b>	84 547	4.2%	4.6%	4.8%	7.8%	10.6%	10.5%	14.3%	16.3%	8.8%	8.1%	5.2%	4.8%
<b>AT</b>	102 827	10.9%	11.7%	8.9%	6.2%	5.5%	7.3%	11.6%	13.2%	8.0%	5.4%	3.2%	8.0%
<b>PL</b>	55 020	5.4%	5.7%	5.8%	6.0%	8.5%	10.2%	15.8%	15.4%	9.1%	7.2%	5.6%	5.2%
<b>PT</b>	43 542	4.2%	4.9%	6.1%	8.0%	8.4%	9.9%	12.7%	17.8%	10.5%	8.0%	5.2%	4.4%
<b>RO</b>	17 325	4.1%	4.5%	4.8%	5.3%	8.3%	10.9%	15.8%	17.3%	9.5%	7.9%	6.7%	4.9%
<b>SI</b>	8 115	6.1%	6.2%	5.7%	7.1%	7.5%	9.3%	14.9%	16.8%	9.0%	7.0%	4.9%	5.4%
<b>SK</b>	10 253	6.6%	7.5%	6.7%	6.4%	8.0%	9.0%	14.4%	13.6%	8.8%	7.9%	6.1%	5.0%
<b>FI</b>	18 574	6.9%	7.2%	8.0%	7.2%	6.6%	10.9%	15.4%	10.8%	7.6%	7.0%	6.1%	6.4%
<b>SE</b>	47 447	4.8%	5.4%	6.0%	5.9%	8.3%	10.8%	22.3%	13.9%	6.8%	5.9%	5.1%	4.7%
<b>UK</b>	268 030	3.7%	4.2%	5.4%	8.8%	10.4%	9.6%	14.8%	16.3%	9.3%	7.6%	5.0%	4.9%
<b>LI</b>	122	9.5%	10.3%	9.5%	7.1%	6.6%	8.4%	9.3%	11.2%	9.1%	8.0%	5.0%	6.1%
<b>NO</b>	28 027	5.2%	6.0%	6.5%	5.9%	7.7%	12.6%	19.4%	13.6%	7.4%	5.9%	5.3%	4.4%
<b>CH</b>	35 589	8.1%	9.0%	8.7%	6.9%	6.9%	8.5%	11.4%	11.7%	9.6%	7.4%	4.8%	7.0%
<b>HR</b>	37 485	0.9%	0.8%	1.2%	3.6%	7.3%	14.2%	26.2%	28.2%	12.2%	3.5%	1.0%	0.8%

Notes: EL and FR: "Other collective accommodation" includes only tourist campsites. CH and LI: only "Hotels and similar establishments".

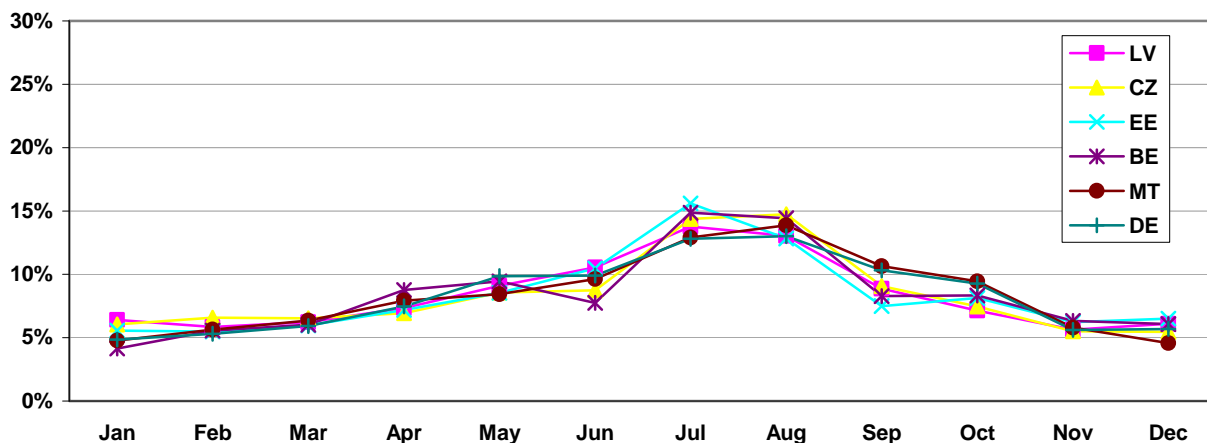
Source: Eurostat ([tour\\_occ\\_nim](#))

**Figure 2a: Monthly distribution of nights spent in collective accommodation, 2009 (countries with high seasonality)**



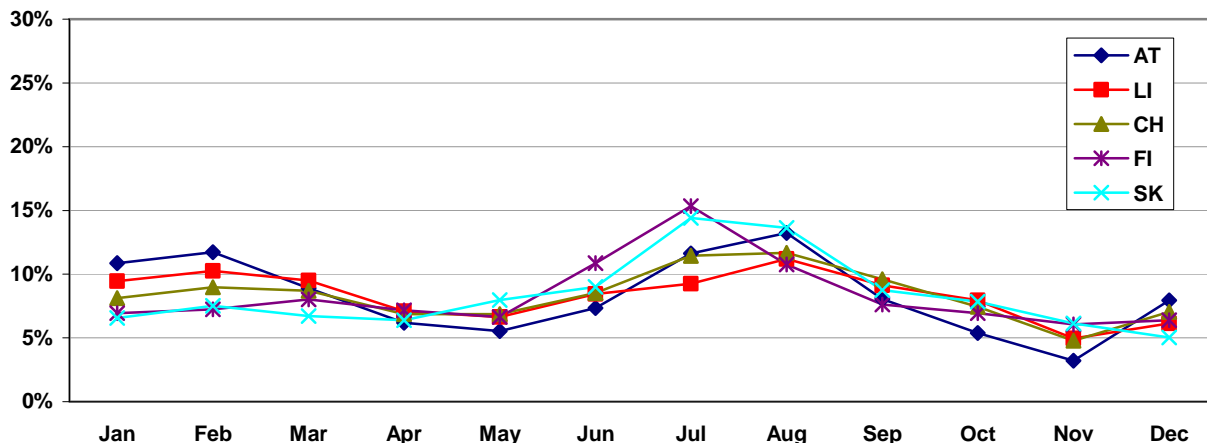
Note: EL and FR: "Other collective accommodation" includes only tourist campsites.  
Source: Eurostat ([tour\\_occ\\_nim](#))

**Figure 2b: Monthly distribution of nights spent in collective accommodation, 2009 (countries having low seasonality, summer peak only)**



Source: Eurostat ([tour\\_occ\\_nim](#))

**Figure 2c: Monthly distribution of nights spent in collective accommodation, 2009 (bimodal pattern with summer and winter peak)**



Note: CH and LI: only "Hotels and similar establishments"  
Source: Eurostat ([tour\\_occ\\_nim](#))

**Table 2: Seasonal variation in occupancy of collective tourist accommodation, monthly data, 2009.**

Country	Tourism nights spent in the peak month ('000)		Tourism nights spent in the bottom month ('000)		Ratio peak/bottom
<b>EU-27</b>	<b>385 606</b>	<b>Aug</b>	<b>100 438</b>	<b>Nov</b>	<b>3.8</b>
<b>BE</b>	4 346	Jul	1 212	Jan	3.6
<b>BG</b>	3 329	Aug	425	Nov	7.8
<b>CZ</b>	5 399	Aug	2 003	Dec	2.7
<b>DK</b>	6 340	Jul	684	Jan	9.3
<b>DE</b>	40 825	Aug	15 217	Jan	2.7
<b>EE</b>	642	Jul	226	Feb	2.8
<b>IE</b>	4 427	Aug	1 326	Jan	3.3
<b>EL</b>	13 376	Aug	993	Jan	13.5
<b>ES</b>	57 209	Aug	16 092	Jan	3.6
<b>FR</b>	66 633	Aug	11 422	Jan	5.8
<b>IT</b>	76 947	Aug	10 682	Nov	7.2
<b>CY</b>	2 080	Aug	334	Jan	6.2
<b>LV</b>	350	Jul	143	Nov	2.4
<b>LT</b>	398	Jul	126	Feb	3.1
<b>LU</b>	397	Jul	85	Dec	4.7
<b>HU</b>	3 129	Jul	794	Feb	3.9
<b>MT</b>	957	Aug	315	Dec	3.0
<b>NL</b>	13 805	Aug	3 522	Jan	3.9
<b>AT</b>	13 593	Aug	3 307	Nov	4.1
<b>PL</b>	8 689	Jul	2 843	Dec	3.1
<b>PT</b>	7 729	Aug	1 843	Jan	4.2
<b>RO</b>	2 998	Aug	717	Jan	4.2
<b>SI</b>	1 364	Aug	400	Nov	3.4
<b>SK</b>	1 478	Jul	517	Dec	2.9
<b>FI</b>	2 851	Jul	1 127	Nov	2.5
<b>SE</b>	10 579	Jul	2 210	Dec	4.8
<b>UK</b>	43 560	Aug	9 996	Jan	4.4
<b>LI</b>	14	Aug	6	Nov	2.3
<b>NO</b>	5 427	Jul	1 223	Dec	4.4
<b>CH</b>	4 157	Aug	1 696	Nov	2.5
<b>HR</b>	10 576	Aug	300	Dec	35.2

Notes: EL and FR: "Other collective accommodation" includes only tourist campsites. CH and LI: only "Hotels and

Source: Eurostat ([tour\\_occ\\_nim](#))

Another way to evaluate seasonality is to look at the difference between the peak and the trough months (see Table 2).

On average for the EU-27, this ratio was 3.8. This means that occupancy (in nights spent) of accommodation establishments was nearly 4 times higher in the peak month (August) than in the trough month (November). Using this measure, the countries with the highest seasonality were again Greece and Croatia. In Greece, more than 13 million nights spent were recorded in the peak month August, while just under 1 million nights spent were recorded in January. In Croatia, more than 10 million nights spent away were recorded in August, 35 times more than the 300 000 nights spent in December. The third highest ratio was found in Denmark, where the number of nights spent in the peak month exceeded that of the slowest month by a factor of 9.3. In Denmark, 23.9% of all nights spent were recorded in July — the highest monthly share in the EU in 2009. In the European Union, below average (under 3) seasonality ratios were found in Latvia (2.4), Finland (2.5), Germany (2.7), Estonia (2.8) and Slovakia (2.9). The winter season peak also narrowed the deviation between the peak and trough months in Liechtenstein (2.3) and Switzerland (2.5).

A similar approach is used in Table 3. However, here the period of observation is extended to the two peak and two slowest months. At EU-27 level, the peak months of July and August accounted for 33% of nights away in tourist accommodation. At the other end, the slowest months (November and January) represented less than 10% of the annual nights spent away. The two peak months were most pronounced in Bulgaria (43%), France (42%), Greece (41%) and Italy (40%) while the two slowest months were least significant in Greece (3%), Cyprus (5%), Bulgaria and Denmark (6%). Again, an exceptionally high seasonal influence was observed in Croatia where July and August represented more than half (54%) of all nights away and February and December each represented less than 1% (see also Table 1).

In all EU Member States, the peak months for the tourist accommodation sector were July and August, except in Austria (February and August) and Finland (June and July).

**Table 3: Share of tourism nights spent in collective accommodation during the busiest and slowest months of the year, 2009**

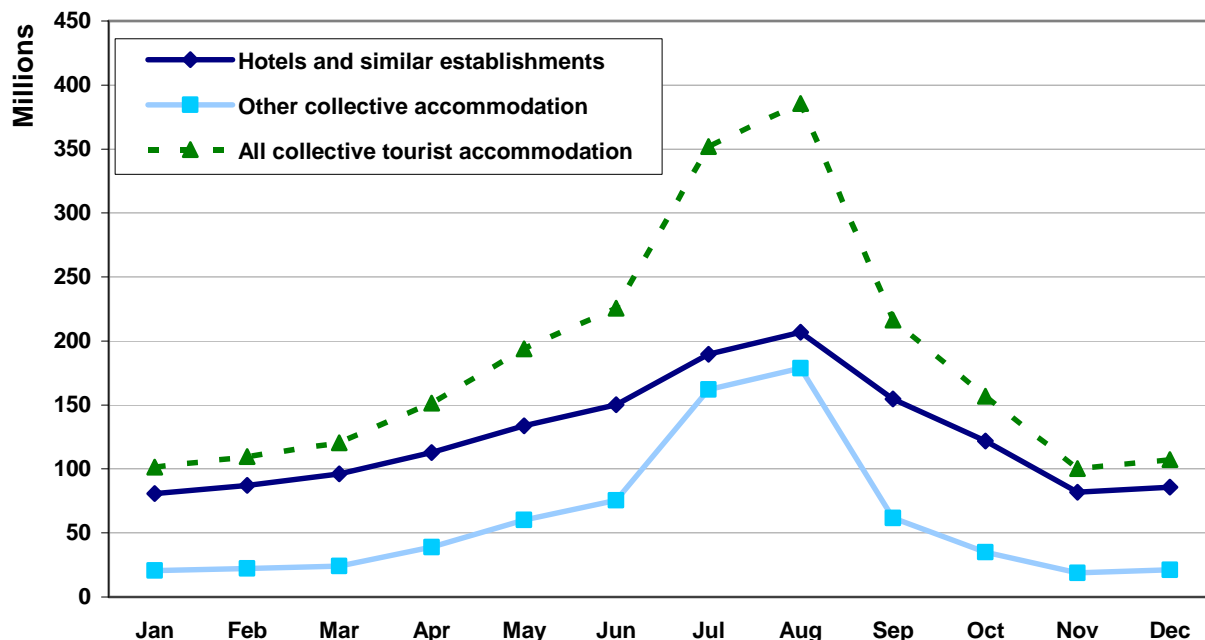
Country	Share of the tourism nights spent in the 2 busiest months				Cumulative share of the 2 busiest months	Share of the tourism nights spent in the 2 slowest months				Cumulative share of the 2 slowest months
	17%	Aug	16%	Jul		5%	Nov	5%	Jan	
<b>EU-27</b>	<b>17%</b>	<b>Aug</b>	<b>16%</b>	<b>Jul</b>	<b>33%</b>	<b>5%</b>	<b>Nov</b>	<b>5%</b>	<b>Jan</b>	<b>9%</b>
<b>BE</b>	15%	Jul	14%	Aug	29%	4%	Jan	6%	Feb	10%
<b>BG</b>	22%	Aug	21%	Jul	43%	3%	Nov	3%	Dec	6%
<b>CZ</b>	15%	Aug	14%	Jul	29%	5%	Dec	6%	Nov	11%
<b>DK</b>	24%	Jul	15%	Aug	39%	3%	Jan	3%	Feb	6%
<b>DE</b>	13%	Aug	13%	Jul	26%	5%	Jan	5%	Feb	10%
<b>EE</b>	16%	Jul	13%	Aug	28%	5%	Feb	6%	Jan	11%
<b>IE</b>	15%	Aug	15%	Jul	29%	4%	Jan	5%	Nov	9%
<b>EL</b>	22%	Aug	20%	Jul	41%	2%	Jan	2%	Feb	3%
<b>ES</b>	16%	Aug	14%	Jul	30%	5%	Jan	5%	Dec	9%
<b>FR</b>	23%	Aug	20%	Jul	42%	4%	Jan	4%	Nov	8%
<b>IT</b>	21%	Aug	18%	Jul	40%	3%	Nov	4%	Dec	7%
<b>CY</b>	16%	Aug	14%	Jul	30%	3%	Jan	3%	Dec	5%
<b>LV</b>	14%	Jul	13%	Aug	27%	6%	Nov	6%	Feb	11%
<b>LT</b>	16%	Jul	15%	Aug	31%	5%	Feb	5%	Nov	10%
<b>LU</b>	18%	Jul	17%	Aug	35%	4%	Dec	4%	Jan	8%
<b>HU</b>	17%	Jul	17%	Aug	34%	4%	Feb	4%	Jan	9%
<b>MT</b>	14%	Aug	13%	Jul	27%	5%	Dec	5%	Jan	9%
<b>NL</b>	16%	Aug	14%	Jul	31%	4%	Jan	5%	Feb	9%
<b>AT</b>	13%	Aug	12%	Feb	25%	3%	Nov	5%	Oct	9%
<b>PL</b>	16%	Jul	15%	Aug	31%	5%	Dec	5%	Jan	11%
<b>PT</b>	18%	Aug	13%	Jul	30%	4%	Jan	4%	Dec	9%
<b>RO</b>	17%	Aug	16%	Jul	33%	4%	Jan	4%	Feb	9%
<b>SI</b>	17%	Aug	15%	Jul	32%	5%	Nov	5%	Dec	10%
<b>SK</b>	14%	Jul	14%	Aug	28%	5%	Dec	6%	Nov	11%
<b>FI</b>	15%	Jul	11%	Jun	26%	6%	Nov	6%	Dec	12%
<b>SE</b>	22%	Jul	14%	Aug	36%	5%	Dec	5%	Jan	9%
<b>UK</b>	16%	Aug	15%	Jul	31%	4%	Jan	4%	Feb	8%
<b>LI</b>	11%	Aug	10%	Feb	21%	5%	Nov	6%	Dec	11%
<b>NO</b>	19%	Jul	14%	Aug	33%	4%	Dec	5%	Jan	10%
<b>CH</b>	12%	Aug	11%	Jul	23%	5%	Nov	7%	May	12%
<b>HR</b>	28%	Aug	26%	Jul	54%	1%	Dec	1%	Feb	2%

Notes: EL and FR: "Other collective accommodation" includes only tourist campsites. CH and LI: only "Hotels and similar establishments".

Source: Eurostat ([tour\\_occ\\_nim](#))

Seasonality in the tourist accommodation sector was less pronounced for establishments operated as a hotel than for other types of establishments

Figure 3: Monthly distribution of the total nights spent in collective tourist accommodation, by type of accommodation, 2009, EU-27



Source: Eurostat ([tour\\_occ\\_nim](#))

In the previous sections, the tourist accommodation sector was analysed as a whole. A breakdown by type of accommodation reveals that in 2009, seasonal fluctuations were less prominent for hotels and similar establishments than for other tourist accommodation such as campsites (see Table 4 and Figure 3). For ease of presentation, the monthly data is grouped per quarter in Table 4. In all countries except Malta, the peak for the hotels (37% in the third quarter, on average for the EU) was lower than the peak for other types of tourist accommodation (56% in the third quarter, on average for the EU). In only three countries, hotels and similar establishments had to rely on the third quarter for more than half of their overnight stays: Bulgaria (54%), Greece (55%) and Croatia (57%). Establishments active in other segments of the

accommodation sector had a much higher peak in the period July to September.

The double peak pattern for Austria is also reflected in the data in Table 4, showing that the number of nights spent in hotels and similar establishments in the first quarter (32% of the annual total) outnumbered the traditional peak quarter, the third quarter (31%). The monthly distribution broken down by type of accommodation (see Figure 3) indicates that the summer peak could be partly related to higher seasonality for other tourist accommodation. This subsector includes tourist campsites, which depend more much on the weather (and are often closed in winter). However, the seasonal bias for hotels and similar establishments was most probably smoothed by overnight business travel.

**Table 4: Nights spent in collective tourist accommodation, per quarter, by type of accommodation, 2009**

	Hotels and similar establishments					Other collective accommodation				
	Share in total nights spent in 2009 (in '000)	Distribution per quarter				Share in total nights spent in 2009 (in '000)	Distribution per quarter			
		Q1	Q2	Q3	Q4		Q1	Q2	Q3	Q4
<b>EU-27</b>	<b>68%</b>	<b>18%</b>	<b>26%</b>	<b>37%</b>	<b>19%</b>	<b>32%</b>	<b>9%</b>	<b>24%</b>	<b>56%</b>	<b>10%</b>
<b>BE</b>	54%	19%	26%	30%	25%	46%	12%	25%	47%	16%
<b>BG</b>	92%	11%	25%	54%	10%	8%	8%	19%	64%	9%
<b>CZ</b>	69%	21%	26%	32%	21%	31%	16%	21%	51%	12%
<b>DK</b>	38%	17%	26%	35%	23%	62%	6%	31%	54%	9%
<b>DE</b>	69%	19%	26%	32%	23%	31%	10%	29%	46%	15%
<b>EE</b>	85%	17%	26%	34%	22%	15%	15%	26%	45%	14%
<b>IE</b>	78%	17%	29%	36%	19%	22%	10%	31%	48%	11%
<b>EL</b>	97%	6%	29%	55%	10%	3%	:	17%	82%	:
<b>ES</b>	72%	16%	27%	38%	19%	28%	16%	22%	47%	16%
<b>FR</b>	65%	19%	27%	33%	21%	35%	:	15%	85%	:
<b>IT</b>	66%	16%	25%	44%	15%	34%	6%	24%	63%	7%
<b>CY</b>	99%	9%	29%	43%	18%	1%	7%	32%	44%	17%
<b>LV</b>	86%	18%	27%	35%	19%	14%	20%	24%	39%	17%
<b>LT</b>	82%	18%	28%	35%	20%	18%	9%	21%	61%	9%
<b>LU</b>	56%	20%	27%	29%	24%	44%	4%	30%	60%	6%
<b>HU</b>	80%	17%	26%	37%	21%	20%	4%	25%	65%	6%
<b>MT</b>	98%	17%	26%	38%	20%	2%	21%	22%	33%	24%
<b>NL</b>	37%	19%	28%	30%	23%	63%	10%	30%	45%	15%
<b>AT</b>	78%	32%	19%	31%	18%	22%	30%	18%	39%	13%
<b>PL</b>	45%	20%	26%	32%	23%	55%	14%	24%	47%	14%
<b>PT</b>	84%	16%	27%	38%	19%	16%	10%	21%	59%	11%
<b>RO</b>	95%	14%	25%	42%	20%	5%	6%	22%	63%	9%
<b>SI</b>	68%	20%	25%	35%	20%	32%	14%	21%	52%	12%
<b>SK</b>	62%	23%	25%	31%	21%	38%	17%	21%	46%	15%
<b>FI</b>	81%	24%	24%	31%	21%	19%	15%	27%	47%	11%
<b>SE</b>	55%	20%	25%	34%	22%	45%	12%	25%	54%	8%
<b>UK</b>	63%	17%	29%	34%	21%	37%	7%	29%	51%	12%
<b>LI</b>	:	29%	22%	30%	19%	:	:	:	:	:
<b>NO</b>	63%	22%	25%	34%	20%	37%	11%	29%	52%	8%
<b>CH</b>	:	26%	22%	33%	19%	:	:	:	:	:
<b>HR</b>	50%	5%	30%	57%	9%	50%	1%	21%	76%	2%

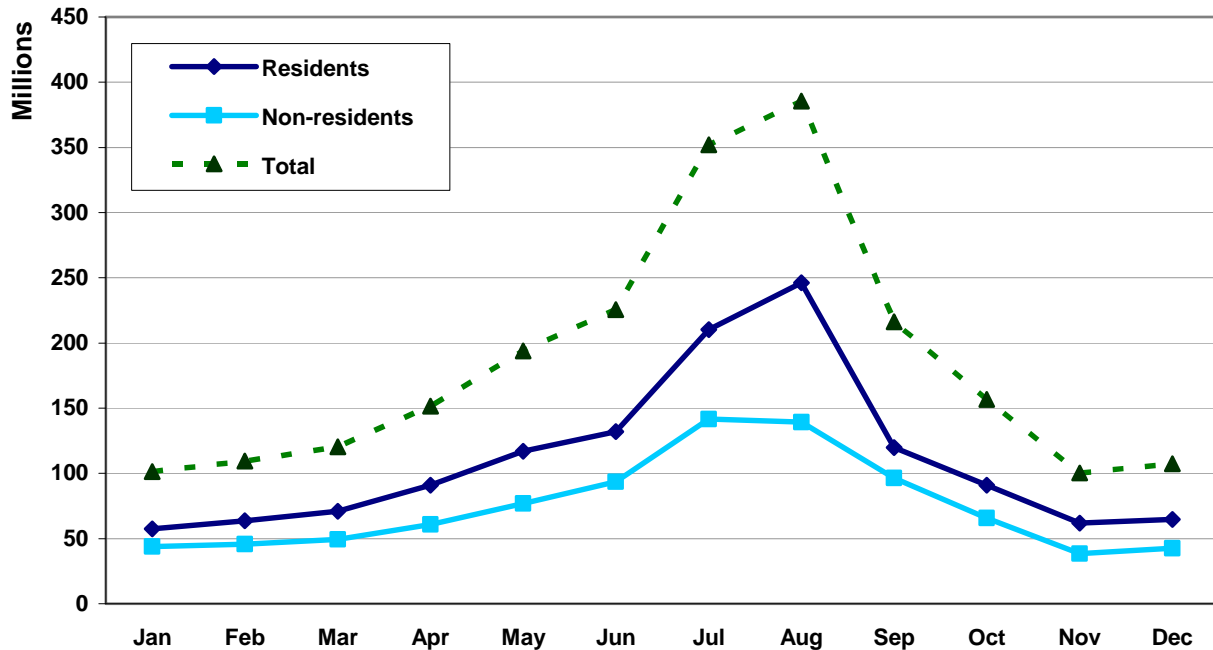
Notes: EL and FR: "Other collective accommodation" includes only tourist campsites.

Source: Eurostat ([tour\\_occ\\_nim](#))



## Nights spent away by residents in tourist accommodation were more concentrated in July and August than travel by non-residents

Figure 4: Monthly distribution of the total nights spent in collective tourist accommodation, by country of origin of the guest (resident / non-resident), 2009, EU-27



Source: Eurostat ([tour\\_occ\\_nim](#))

Domestic travellers appeared to be the main contributors to the peak in nights spent in tourist accommodation in July and August (see Figure 4). In the other months of the year, the figures for residents and non-residents were comparable.

Schemes to encourage domestic holiday makers to travel in the low season could reduce the seasonal bias in the tourist accommodation sector. However, although the domestic market may be easier to reach (from a marketing and tourism policy point of view), the importance of school holidays and production downtime in certain sectors of the economy cannot be ignored as key factors in planning holidays.

In Figure 4, the number of nights spent away by residents peaked clearly in July and August, and dipped in September. Over a three-month period, the seasonal effects were slightly smoothed by grouping peak months and more 'normal' months.

At aggregate level (EU-27), the distribution of nights spent away by residents and non-resident broadly followed the same pattern (Table 5). In the countries identified earlier as having a strong seasonal bias in the accommodation sector, there were differences between the numbers of resident and foreign guests. In Bulgaria, Denmark, Greece and Croatia, the share of nights spent by residents (out of the total number of nights away during the year) recorded in the third quarter was comparable to the European average, while more than half of all nights spent away by non-residents were recorded in the third quarter. In Italy and France, both the share of nights spent by residents and non-residents was much higher in the third quarter compared to the rest of Europe. In Cyprus, 55% of all nights spent by residents was recorded during the third quarter (but note that the Cypriot market accounted for only 10% of the Cypriot accommodation sector in 2009).

**Table 5: Nights spent in collective tourist accommodation, per quarter, by country of origin of the guest (resident / non-resident), 2009**

	Residents					Non-residents				
	Share in total nights spent in 2009 (in '000)	Distribution per quarter				Share in total nights spent in 2009 (in '000)	Distribution per quarter			
		Q1	Q2	Q3	Q4		Q1	Q2	Q3	Q4
<b>EU27</b>	<b>60%</b>	<b>14%</b>	<b>26%</b>	<b>43%</b>	<b>16%</b>	<b>40%</b>	<b>16%</b>	<b>26%</b>	<b>42%</b>	<b>16%</b>
<b>BE</b>	47%	14%	25%	41%	19%	53%	17%	27%	34%	22%
<b>BG</b>	38%	16%	24%	43%	17%	62%	7%	25%	62%	5%
<b>CZ</b>	52%	19%	22%	43%	15%	48%	19%	26%	33%	22%
<b>DK</b>	69%	11%	30%	45%	14%	31%	9%	26%	51%	14%
<b>DE</b>	83%	16%	28%	36%	20%	17%	18%	25%	35%	22%
<b>EE</b>	34%	21%	24%	34%	21%	66%	15%	27%	37%	21%
<b>IE</b>	42%	16%	26%	39%	19%	58%	15%	31%	38%	16%
<b>EL</b>	29%	14%	22%	49%	16%	71%	2%	31%	59%	8%
<b>ES</b>	42%	15%	25%	43%	17%	58%	16%	26%	39%	18%
<b>FR</b>	66%	13%	22%	50%	14%	34%	11%	24%	53%	12%
<b>IT</b>	57%	13%	23%	52%	12%	43%	12%	27%	48%	13%
<b>CY</b>	10%	13%	20%	55%	13%	90%	9%	30%	42%	19%
<b>LV</b>	33%	22%	25%	32%	21%	67%	17%	28%	38%	18%
<b>LT</b>	45%	17%	24%	42%	18%	55%	15%	29%	38%	18%
<b>LU</b>	8%	17%	33%	33%	18%	92%	13%	28%	43%	16%
<b>HU</b>	50%	15%	24%	43%	18%	50%	13%	27%	41%	18%
<b>MT</b>	5%	23%	22%	31%	24%	95%	16%	26%	38%	20%
<b>NL</b>	70%	13%	29%	41%	17%	30%	15%	29%	36%	20%
<b>AT</b>	30%	24%	23%	34%	19%	70%	35%	17%	33%	16%
<b>PL</b>	83%	17%	24%	41%	17%	17%	17%	27%	36%	20%
<b>PT</b>	43%	14%	24%	46%	17%	57%	17%	28%	37%	18%
<b>RO</b>	85%	12%	24%	44%	19%	15%	18%	28%	33%	22%
<b>SI</b>	46%	20%	23%	38%	18%	54%	16%	24%	43%	17%
<b>SK</b>	64%	20%	24%	37%	19%	36%	22%	23%	37%	18%
<b>FI</b>	74%	21%	26%	34%	19%	26%	25%	22%	33%	20%
<b>SE</b>	76%	17%	26%	41%	16%	24%	14%	24%	48%	14%
<b>UK</b>	70%	12%	30%	42%	16%	30%	16%	26%	37%	21%
<b>LI</b>	3%	24%	24%	36%	16%	97%	29%	22%	29%	19%
<b>NO</b>	73%	18%	26%	38%	18%	27%	17%	25%	48%	10%
<b>CH</b>	43%	26%	21%	32%	20%	57%	26%	23%	33%	18%
<b>HR</b>	11%	14%	28%	44%	14%	89%	2%	25%	69%	4%

Notes: EL and FR: "Other collective accommodation" includes only tourist campsites. CH and LI: only "Hotels and similar establishments".

Source: Eurostat ([tour\\_occ\\_nim](http://tour_occ_nim))

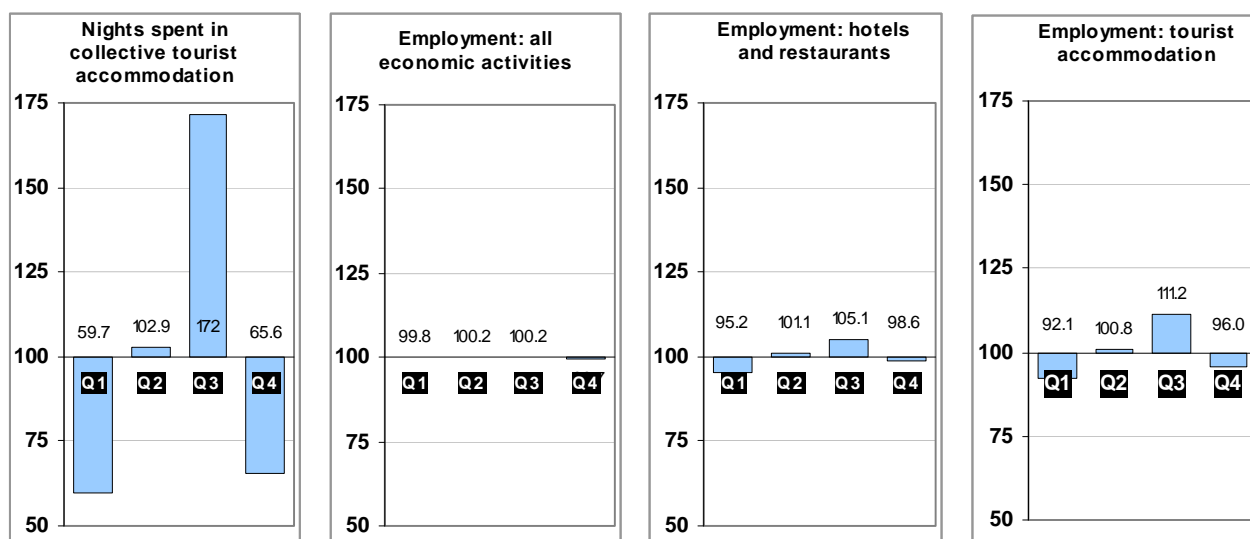
## The strong seasonal variation in activity of the accommodation sector was only partially reflected in the quarterly employment figures

We have seen major seasonal fluctuations in the occupancy (i.e. nights spent away) of accommodation establishments. This final chapter takes a look at the effects of seasonality on employment in the accommodation sector.

Using data from the European Labour Force Survey, Figure 5 indicates that there was a much stronger seasonal bias in the accommodation sector than in the entire HORECA (hotel, restaurant and catering) sector. In the economy as a whole, seasonal fluctuation was very limited, but this aggregate figure of course hides strong seasonal variations in certain branches of the economy.

Nevertheless, seasonality in employment was much less pronounced than economic output (in terms of nights spent away). In the peak season (third quarter), occupancy in accommodation establishments was 72% higher than the annual average while employment was only 11% higher in this quarter compared to the annual average. Although occupancy was 40% lower in the first quarter than the annual average, employment was only 8% below the annual average. Since the data refers to the number of persons employed, it was not possible to analyse the effect of different working time patterns according to the season.

**Figure 5: Seasonal variation<sup>1</sup> in occupancy of collective tourist accommodation and of employment (by sector), 2009, EU-27**



Notes: 1) Standardised quarterly variation compared with the annual average (index = 100).

Source: Eurostat ([tour\\_occ\\_nim](#), [tour\\_lfs1r2](#))

## METHODOLOGICAL NOTES

### Country codes

#### Aggregates:

EU-27: European Union

#### EU Member States

BG: Bulgaria  
BE: Belgium  
CZ: Czech Republic  
DK: Denmark  
DE: Germany  
EE: Estonia

IE: Ireland  
EL: Greece  
ES: Spain  
FR: France  
IT: Italy  
CY: Cyprus  
LV: Latvia  
LT: Lithuania  
LU: Luxembourg  
HU: Hungary

MT: Malta  
NL: Netherlands  
AT: Austria  
PL: Poland  
PT: Portugal  
RO: Romania  
SI: Slovenia  
SK: Slovakia  
FI: Finland  
SE: Sweden

UK: United Kingdom

#### EFTA/EEA

CH: Switzerland  
LI: Liechtenstein  
NO: Norway

#### Candidate countries

HR: Croatia

### Symbols

": " data unavailable or unreliable

### Concepts and definitions

**Tourism** refers to the activity of visitors making a trip to a main destination outside their usual environment, for less than a year, for any main purpose, including business,

leisure or other personal reasons, other than to take up employment by a resident entity in that place.

### ***Collective accommodation establishments***

An accommodation establishment provides overnight lodging for travellers in a room or some other unit. The number of places it provides must be greater than a specified minimum for groups of persons exceeding a single family unit and all the places in the establishment must come under a common commercial-type management, even if it is non-profit-making.

### **Hotels and similar establishments**

#### Hotels

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 bathroom facilities.

#### Similar establishments

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 bathroom facilities. This group also includes guest houses, Bed & Breakfast and farmhouse accommodation.

### **Other collective accommodation establishments**

#### Holiday dwellings

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 campsites

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.

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.

### ***Employed persons***

Employed persons are persons aged 15 and over who worked during the reference week, even for just one hour per week, for pay, profit or family gain or were not at work but had a job or business from which they were temporarily absent due to illness, holidays, industrial disputes, education or training.

### **Data sources**

[Council Directive 95/57/EC of 23 November 1995](#) on the collection of statistical information in the field of tourism organises the European Statistical System of tourism statistics. This system consists of two main components: statistics on capacity and occupancy of tourist accommodation and statistics on tourism demand. The former are collected in most Member States via surveys filled in by accommodation establishments, while the latter are mostly collected by means of traveller surveys at the border or via traditional household surveys.

## **Further information**

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Eurostat Website: <http://ec.europa.eu/eurostat>

Data on "Tourism statistics":

<http://epp.eurostat.ec.europa.eu/portal/page/portal/tourism/data/database>

More information about "Tourism statistics":

<http://epp.eurostat.ec.europa.eu/portal/page/portal/tourism/introduction>

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### **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](mailto:eurostat-mediasupport@ec.europa.eu)

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### **European Statistical Data Support:**

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