

Statistics

in focus

INDUSTRY, TRADE
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SECTORIAL PROFILES

THEME 4 – 5/1999

Contents

Tourist flows	2
Top tourism generating countries	3
EU tourism receipts up by 8%....	4
Accommodation structure	5
Employment in hotels and restaurants	6
Hotels and restaurants consumer price index.....	7



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Inbound tourism flows rising in Europe

Sophia Eriksson

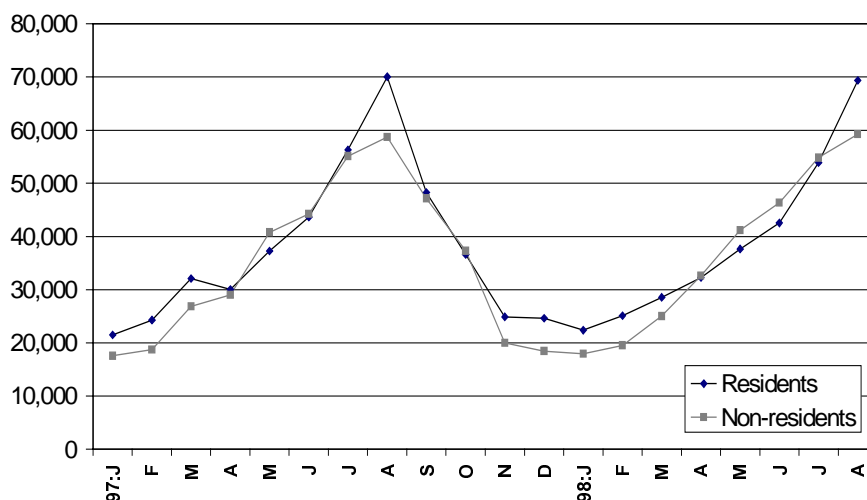


Figure 1: Nights spent by residents and non residents in hotels and similar establishments in EU countries (1000s)¹

The first six months of 1998 indicate a growth in tourism in EU countries, both in terms of tourist flows and travel receipts, thus continuing the trend observed in 1997. The growth rate was faster for international tourism compared to domestic tourism. In April 1998, inbound tourism grew as much as 12.4% compared to corresponding month of the previous year. EU tourism receipts grew 8.9% during the first six months of 1998 compared to 1997.

In Portugal the world fair showed a remarkable positive impact on growth rates of tourism. Inbound tourist flows rose by more than 16% in June 1998 compared to 1997, and tourism receipts increased by 15.2% during the second quarter 1998 in relation to 1997. This seems to have had positive effects also on the neighbouring country Spain, which noted a 6.6% increase of inbound tourist flows in June 1998 and 12.4% higher receipts during second quarter of 1998 compared to the previous year.

The seasonal pattern of tourism flows in 1998 follow earlier years, with strong peaks for July and August. Guest flows were more than three times higher during the peak season in relation to the lowest season, which normally is observed in January. For the first eight months of 1998, resident guest flows were higher during the beginning of the year and the peak season in August, while inbound tourism was more dominant from April to June.

The supply of tourist accommodation in EU countries remained stable during 1997 in terms of establishments, although a slight drop of bed-places was observed. EU employment in hotels and restaurants grew by 3.8% in 1997, indicating that the tourism sector is an important generator of employment.

¹ Note: Excluding EL, IRL, NL, A, S for non-residents; also F for residents.

Tourist flows

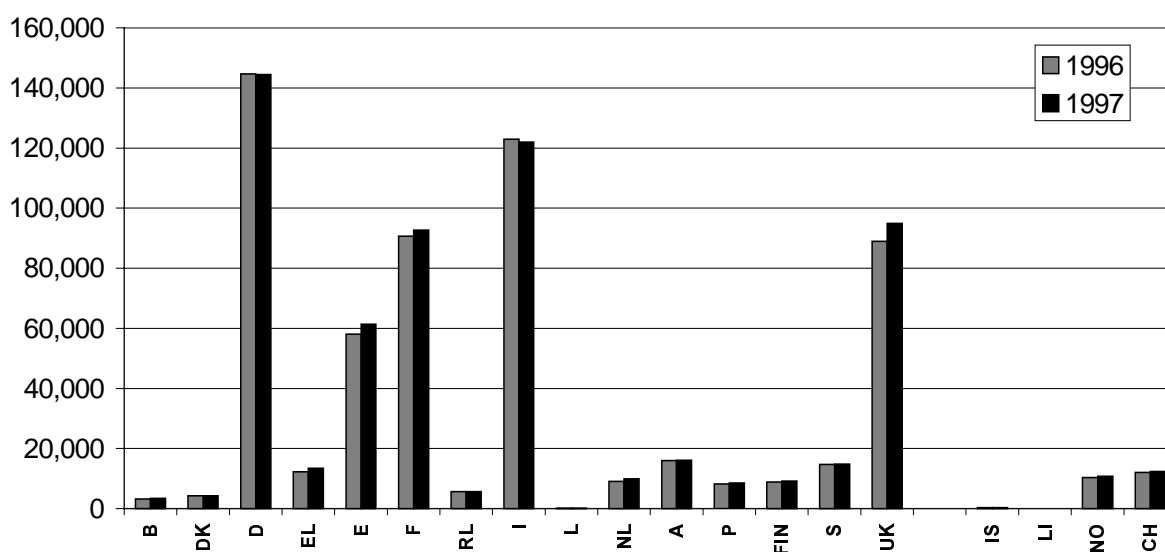


Figure 2: Nights spent by residents in hotels and similar establishments (1000s)

Recent analysis shows that international tourist flows are growing faster than domestic tourism. Non resident guest flows in hotels and similar establishments in 1997 increased by 4.8% compared to the previous year, whereas residents nights increased only by 2.2%. The annual increase of non resident nights was particularly strong in France (over 20%), Greece (13.9%) and the Netherlands (13.3%). The same trend is even more apparent in the euro-zone², where nights spent by non residents increased by as much as 5.2%, compared to a 1.2% in-

crease in residents' nights. Tourism demand in the EU countries, amounted to 1.14 billion in terms of nights spent in hotels and similar establishments in 1997 compared to 1.10 billion in 1996 (+3.4%). More than 50% is attributable to domestic tourism, the remainder to inbound tourism. Resident overnight stays in the EU countries surpassed 600 million and non-resident nights were almost 540 million. The annual increase of resident nights was particularly strong in Greece (9.8%), the Netherlands

(8.7%) and the United Kingdom (6.7%).

Those countries having the highest number of resident overnight stays were in 1997 Germany, Italy, United Kingdom and France. The number of overnight non-resident stays was highest in Spain, United Kingdom and Italy.

² Belgium, Germany, Spain, France, Ireland, Italy, Luxembourg, Netherlands, Austria, Portugal and Finland.

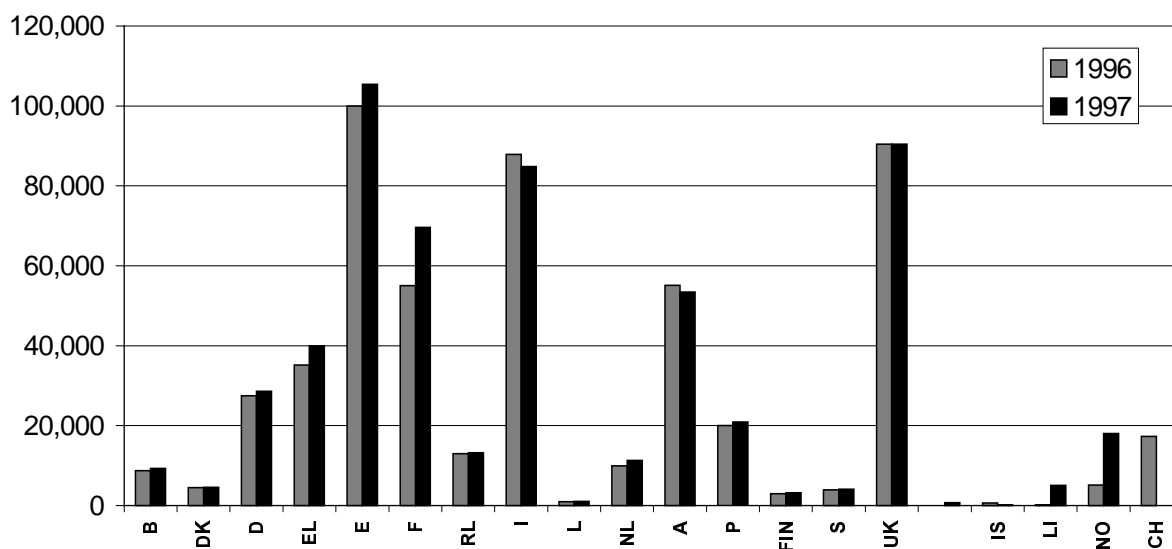


Figure 3: Nights spent by non residents in hotels and similar establishments (1000s)

Top tourism generating countries

Germany is the top tourism generating country for other EU countries, accounting for 39% of total nights spent by non residents in hotels and similar establishments in 1997. The second largest tourism generating country is United Kingdom, followed by France and Netherlands. These four countries together generate more than 70% of the tourism market in EU. For the euro-zone destinations, these four countries generate more than 80% of inbound tourism.

For individual countries, German tourists account for as much as 69% of nights spent by non residents in Austria, 50% in Italy, 39% in Greece and 37% in Spain. Other countries where Germany is the first market are Netherlands, Sweden and United Kingdom. Countries where tourists from the United Kingdom provide the first market

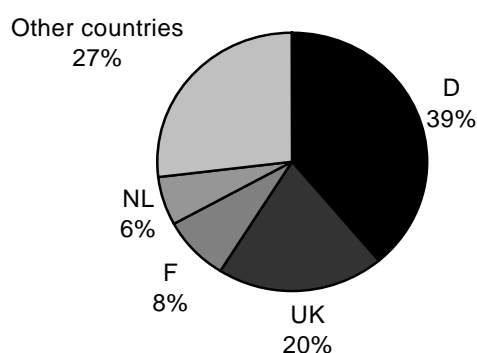


Figure 4: Main tourism generating countries in EU-15 destinations

are Ireland (25%) and Belgium (21%).

Moreover, the main generating country for tourism in Denmark and Finland is Sweden, for Germany the Netherlands represents the first market, and in

Luxembourg the Belgian tourists are the most prevalent. For Iceland, Norway, Liechtenstein and Switzerland, German tourists represent the first market.

	First market		Second market		Third market		Fourth market		Share of the top four markets
	Country	%	Country	%	Country	%	Country	%	%
EU-15	D	39	UK	20	F	8	NL	6	73
EUR-11	D	44	UK	24	F	7	NL	7	82
Belgium	UK	21	D	19	NL	18	F	17	75
Denmark	S	33	N	21	D	17	UK	10	81
Germany	NL	18	UK	17	I	10	CH	9	54
Greece	D	39	UK	15	F	7	I	6	67
Spain	D	37	UK	32	F	7	B	6	82
France	UK	25	D	22	I	15	B	11	73
Ireland	UK	66	D	10	F	8	NL	5	89
Italy	D	50	F	10	UK	9	A	9	78
Luxembourg	B	31	D	17	NL	17	F	11	76
Netherlands	D	32	UK	28	F	11	B	7	78
Austria	D	69	NL	7	CH	5	UK	5	86
Portugal	UK	32	D	26	E	8	NL	8	74
Finland	S	26	D	20	UK	13	NL	7	66
Sweden	D	27	N	18	UK	14	DK	11	70
United Kingdom	D	20	F	16	IRL	15	E	10	61
Iceland	D	31	UK	13	S	11	DK	9	64
Liechtenstein	D	49	CH	27	A	4	UK	4	84
Norway	D	24	DK	22	S	17	UK	11	74
EEA	D	40	UK	19	F	8	NL	6	73
Switzerland	D	50	UK	11	F	9	I	7	77

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

Table 1: Main tourism generating countries

EU tourism receipts up by 8%

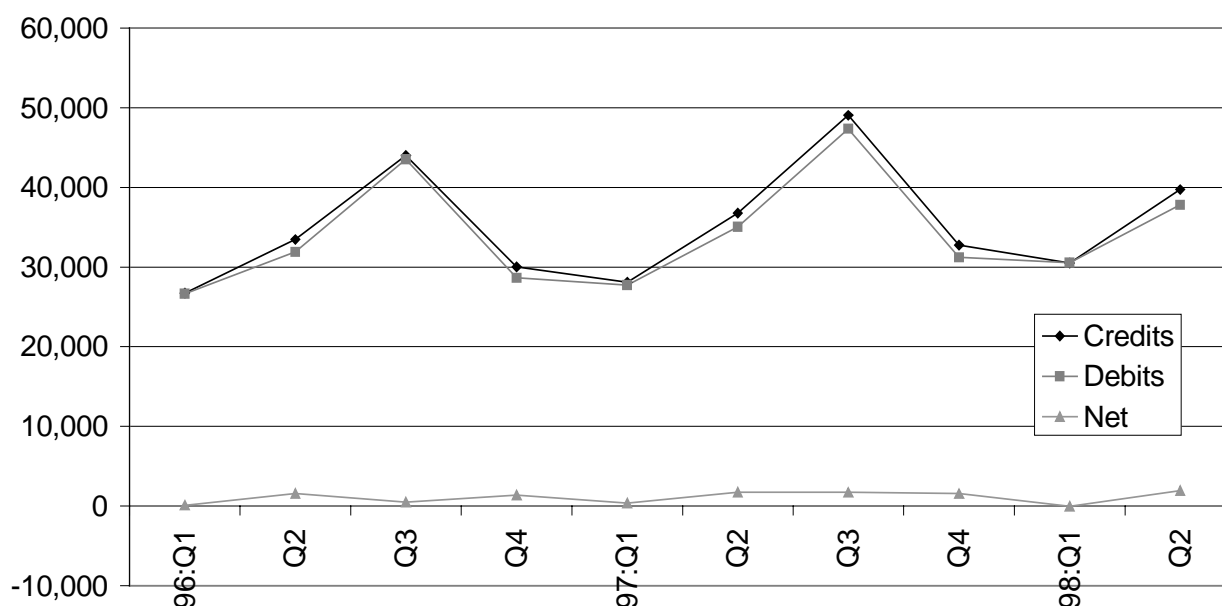


Figure 5: EU Travel item in the Balance of Payments (Mio ECU)

Figures for the first six months of 1998 indicate a continuation of the positive trend observed in 1997. Both tourism receipts and expenditure rose by more than 8% in the EU compared to the first six months of 1997. Nevertheless, the first quarter showed a slight deficit in the travel balance for EU countries as a whole, while the euro-zone retained a positive balance. However, the travel balance regained a surplus in the second quarter of 1998, indicating a 10% increase compared to the corresponding quarter of the previous year.

Portugal had the highest increase in receipts in first six months of 1998 (18.1%), probably due to the world fair 'Expo 98', followed by United Kingdom (15.9%), Greece, Belgium and Luxembourg (all 15.5%) compared to corresponding months in 1997. The Netherlands, Sweden and Spain also noted considerable increases in travel receipts. For the same period Sweden had the largest increase in travel expenditure (28.8%), followed by Greece (26.8%) and United Kingdom (23.5%). The surplus of the tourism foreign trade account enjoyed for many

years by the EU rose from ECU 3.5 billion in 1996 to ECU 5.3 billion in 1997, confirming the higher propensity of inbound tourism to Europe.

Spain (ECU 19.7 billion), Italy (11.6 billion) and France (10.1 billion) had the highest surplus foreign trade account for tourism in 1997. The largest deficit was observed for Germany (ECU 26.2 billion), United Kingdom (5.2 billion) and Netherlands (3.5 billion). In 1997 tourism receipts in the EU amounted to ECU 147 billion and expenditure to ECU 141 billion.

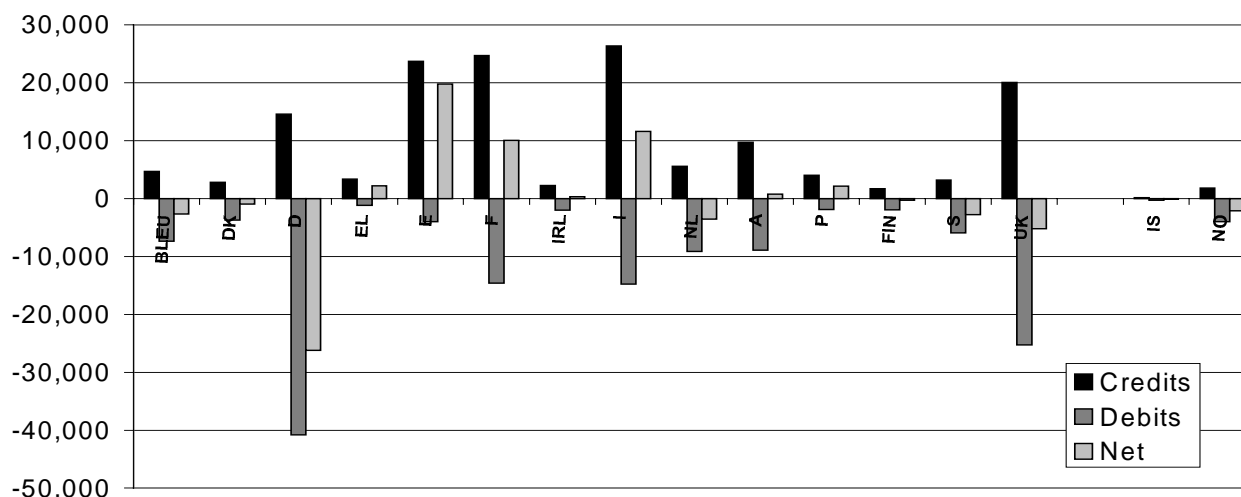


Figure 6: Travel item in the Balance of Payments (Mio ECU), 1997

Accommodation structure

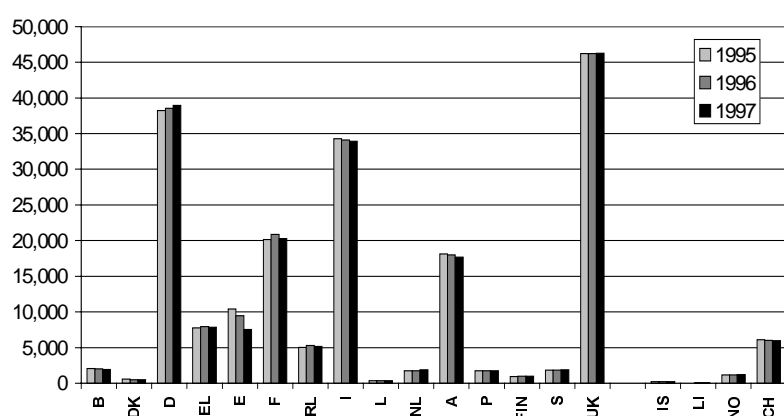


Figure 7: Number of hotels and similar establishments

Final figures for 1997 show that the number of collective tourist accommodation establishments in the EU countries remains stable, with a slight decrease of 0.5%. In 1997 the number of hotels and similar establishments fell 1.4%, whereas other collective accommodation (tourist campsites, holiday dwellings, youth hostels, etc.) increased 1.7%. This trend is marked somewhat more in

the euro-zone, where the number of hotels and similar establishments declined by 2%, while other types of collective accommodation rose by 2.2%. Among the EU countries, United Kingdom, Germany and Italy have the highest number of hotels and similar establishments. The number of bed-places in collective tourist accommodation fell by 1.1% in 1997. This was due to a

drop of 1.8% in tourist campsites, holiday dwellings and other collective accommodation establishments, while bed-places in hotels and similar establishments remained stable (0.2%). In terms of bed-places, the countries with highest capacity are Italy, Germany and France.

Thus, figures indicate that hotels and similar establishments have slightly increased in size. In 1997, the average number of bed-places per establishment was 47.8 compared to 47.2 in 1996. The opposite trend can be observed for other collective accommodation. The average number of bed-places per establishment fell from 130.4 in 1996 to 125.9 in 1997.

The country with the highest number of beds per establishment in 1997 was Spain with a particularly large average size of 129 bed-places per hotel. United Kingdom had the lowest number of bed-places per establishment, namely 21.8 beds.

Table 2: Capacity of collective tourist accommodation

	Hotels and similar establishments				Other collective accommodation establishments			
	Number of establishments		Number of bed-places		Number of establishments		Number of bed-places	
	1996	1997	1996	1997	1996	1997	1996	1997
EU-15	189.521	186.859	8.938.313	8.918.790	80.994	82.413	10.565.876	10.375.041
EUR-11	133.064	130.390	7.078.734	7.090.492	68.897	70.404	8.784.692	8.863.552
Belgium	2.015	1.949	114.385	116.865	1.816	1.810	586.143	583.851
Denmark ⁽¹⁾	478	470	60.080	59.339	635	633	315.349	314.945
Germany	38.565	38.960	1.490.769	1.526.918	15.242	15.955	1.403.836	1.417.144
Greece	7.916	7.850	571.656	577.259	334	335	95.904	97.233
Spain	9.482	7.520	1.025.208	972.721	1,084 ⁽⁵⁾	1,084 ⁽⁴⁾	641,994 ⁽⁵⁾	641,994 ⁽⁴⁾
France	20.849	20.273	1.472.424	1.467.322	9.211	9.226	2.998.578	2.999.626
Ireland	5.274	5.164	96.905	107.425	1.741	2.375	47.484	55.034
Italy	34.080	33.905	1.764.651	1.772.232	33.736	33.521	1.740.986	1.758.568
Luxembourg ⁽²⁾	368	344	14.750	14.776	316	365	52,912 ⁽⁴⁾	47,488 ⁽⁴⁾
Netherlands	1.739	1.857	142.800	157.926	1.973	2.212	676.338	713.226
Austria	17.990	17.692	640.199	633.601	3.006	3.084	272.489	280.379
Portugal	1.744	1.768	208.205	211.315	225	234	264.308	268.077
Finland	958	958	108.438	109.391	547	538	99.624	98.165
Sweden	1.842	1.897	177.620	182.604	1.617	1.609	494.500	372.351
United Kingdom ⁽³⁾	46.221	46.252	1.050.223	1.009.096	9.511	9.432	875.431	726.960
Iceland	216	231	10.209	10.713	:	:	:	:
Liechtenstein	52	52	1.333	1.369	87	:	515	:
Norway	1.186	1.198	133.521	135.605	744 ⁽⁴⁾	748 ⁽⁴⁾	12,596 ⁽⁴⁾	12,711 ⁽⁴⁾
EEA	190.975	188.340	9.083.376	9.066.477	:	:	:	:
Switzerland	6.004	5.952	262.471	261.482	93.837	93.946	813.081	803.611

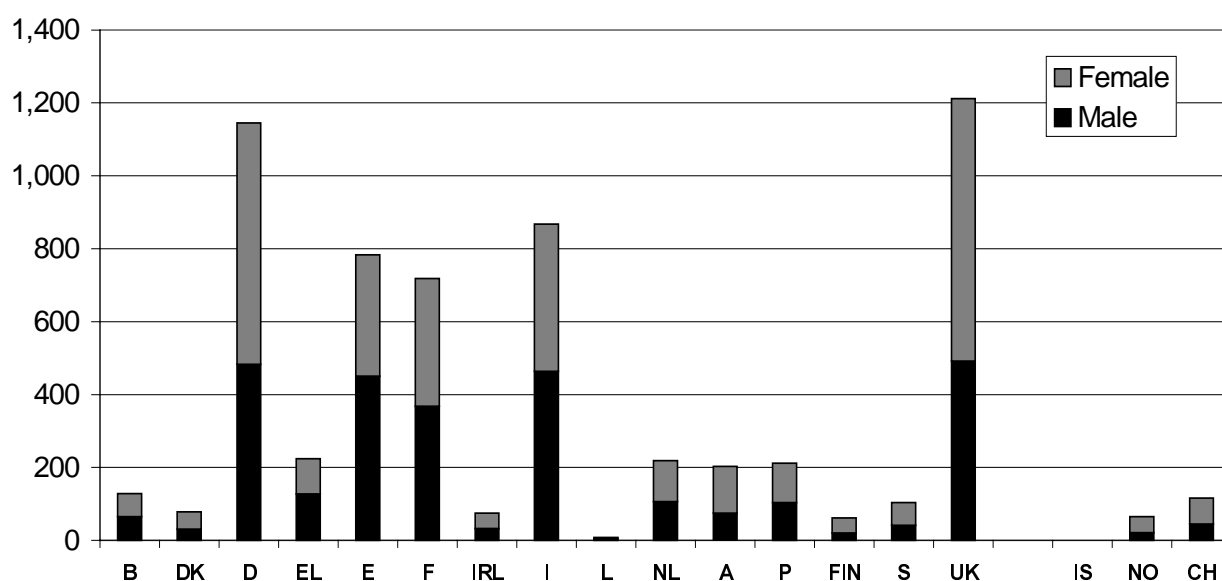
(1) Only establishments with 40 bed-places or more

(2) Figures for bed-places are estimated on the basis of 1.8 bed-places per bedroom

(3) 1995 figures used for 1996

(4) Tourist campsites only; (5) 1997 figures used for 1996

Employment in hotels and restaurants



Note: Persons employed aged 15-64 years
Source: Labour Force Survey

Figure 8: Employment by sex in hotels and restaurants (1000s), 1997

Employment in tourism constitutes all persons employed in sectors whose main activity is to provide services to the tourist. This can include accommodation, food and beverages, transport, retail trade, museums, amusement parks, etc. depending on country. An important, although not exhaustive, indicator for employment in tourism is the number of persons employed in ho-

tels and restaurants.

Employment in hotels and restaurants in the EU countries was in 1997 more than 6 million, marking an increase of 3.8% from previous year. The three countries with the highest number of employed persons in this sector in 1997 were United Kingdom (1.2 million), Germany (1.1 million) and Italy (868,000). Luxembourg, Finland and

Ireland had the lowest employment rates in hotels and restaurants.

The share of female employment in the hotels and restaurants sector in EU was 52.6% in 1997. Among the individual countries the highest shares are observed in northern Europe, with Finland, Denmark and Sweden all exceeding 60% of female employment.

Table 3: Employment by sex in hotels and restaurants

	Male employment (1000s)		Female employment (1000s)		Total (1000s)		Share of female employment (%)	
	1996	1997	1996	1997	1996	1997	1996	1997
EU-15	2,762	2,862	3,056	3,174	5,817	6,036	53	53
EUR-11	2,099	2,172	2,162	2,249	4,260	4,420	51	51
Belgium	61	65	62	63	123	128	50	49
Denmark	25	31	44	47	70	78	63	60
Germany	472	483	639	662	1,111	1,145	58	58
Greece	132	127	91	97	223	224	41	43
Spain	424	451	308	332	732	784	42	42
France	364	368	346	350	709	718	49	49
Ireland	31	32	40	43	70	75	57	57
Italy	449	464	387	403	836	868	46	46
Luxembourg	4	4	4	4	8	9	50	44
Netherlands	100	106	104	113	205	219	51	52
Austria	70	75	121	128	191	203	63	63
Portugal	107	103	103	109	210	212	49	51
Finland	18	20	48	41	66	60	73	68
Sweden	44	41	57	62	101	103	56	60
United Kingdom	462	492	702	720	1,164	1,212	60	59
Iceland	:	:	:	:	:	:	:	:
Norway	21	21	45	44	66	65	68	68
EEA	:	:	:	:	:	:	:	:
Switzerland	34	45	61	71	96	117	64	61

Note: Persons employed aged 15-64 years
Source: Labour Force Survey

Hotels and restaurants consumer price index

The trend of consumer prices in the EU countries showed an increase of 1.3% in 1998 and 1.1% in the euro-zone. Prices in hotels, cafes and restaurants rose significantly more, with a 2.7% rise in the EU countries and 2.2% in the euro-zone. Greece, Ireland and United Kingdom noted the highest increases in prices in the hotels and restaurants sector, while price increases in this sector were very moderate in Germany and Sweden.

All items (%)	Hotels, cafes and restaurants	
	1997	1998
EU-15 ⁽¹⁾	1.7	1.3
EUR-11 ⁽¹⁾	1.6	1.1
Belgium	1.5	0.9
Denmark	1.9	1.3
Germany	1.5	0.7
Greece	5.4	4.5
Spain	1.9	1.8
France	1.3	0.7
Ireland	1.2	2.1
Italy	1.9	2
Luxembourg	1.4	1
Netherlands ⁽²⁾	1.9	1.8
Austria	1.2	0.8
Portugal	1.9	2.2
Finland	1.2	1.4
Sweden	1.8	1
United Kingdom	1.8	1.5
Iceland	1.8	1.3
Norway	2.6	2
EEA ⁽¹⁾	1.7	1.3
Switzerland	.	.

(1) 1997 data estimated. 1998 data provisional.

(2) 1998 data provisional.

Note: Annual average rate of change

Table 4: Harmonised consumer price index

➤ 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. The three forms of tourism can be combined in three ways to derive the following categories of tourism:

- (i) Internal tourism, which comprises "domestic tourism" and "inbound tourism";
- (ii) National tourism, which comprises "domestic tourism" and "outbound tourism";
- (iii) International tourism, which consists of "inbound tourism" and "outbound tourism".

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.

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. A bedplace is also a place on a pitch or in a boat on a mooring to accommodate one person.

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.

Further information:

➤ Reference publications

Title Tourism in Europe - Key figures 1996-1997
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