

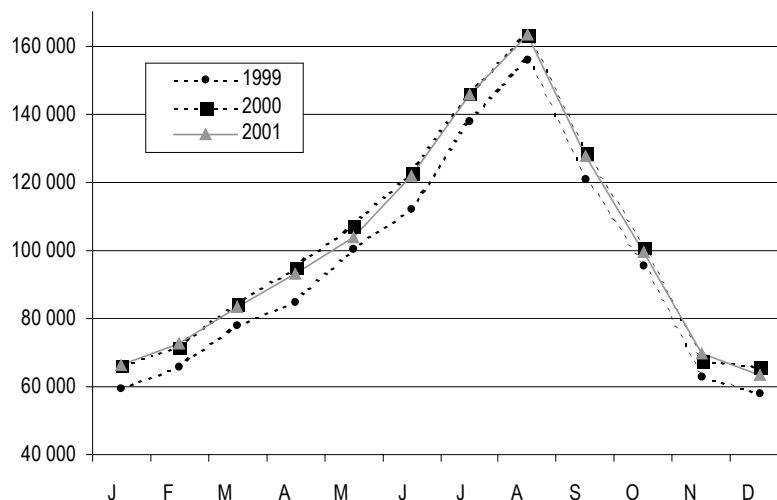
## Contents

Drop in inbound tourism in the last quarter of 2001.....	2
Main countries of origin of tourist.....	3
A surplus on international tourism.....	4
Accommodation structure.....	5
Occupancy rates in hotels and similar establishments.....	6



# Stability of tourism flows in the European Union

*Hans-Werner Schmidt*



*Note:* GR, IRL and S excluded

Graph 1: Total overnight stays (resident and non-resident) in hotels and similar establishments in EU countries('000)

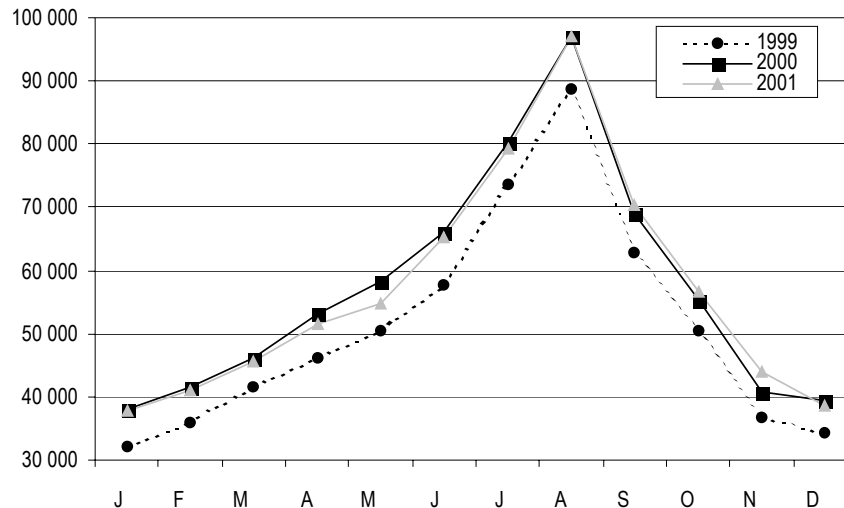
Despite the world economic slowdown and above all the tragic events of September 11, trends in tourism remained stable overall in the European Union<sup>1</sup> in 2001. Even after September 11, the total numbers of nights spent in hotels and similar establishments in EU Member States were similar to the previous year's figures. In retrospect, therefore, 2000 was a very good year for tourism (compared with 1999), and 2001 one of stabilisation. Following the millennium celebrations, the United Kingdom saw the sharpest drop (-6.4%) in total overnight stays in hotels and similar establishments in 2001 compared with 2000. Portugal and the Netherlands also recorded significant declines (-4%). Despite a fall-off in nights spent by non-residents in the last quarter, Italy recorded the highest annual increase (+4%) in the EU<sup>1</sup> in total nights spent in hotels and similar establishments. Luxembourg (+2.5%) and Austria (+1.3%) were the only other Member States with a noticeable increase in total overnight stays in hotels and similar establishments.

Inbound tourism appeared to suffer most from the events of September 11. After rising at the beginning of the year (+2.3% in the first quarter of 2001), the number of nights spent by non-residents in hotels and similar establishments fell markedly in the third quarter. The fall-off continued into the last quarter, reaching a significant rate of -5.7% compared with 2000. Conversely, the number of overnight stays by residents in hotels and similar was higher in the same last quarter of 2001 than in the same period of 2000, clearly demonstrating the replacement of inbound tourism by domestic tourism. Resident nights outnumber non-resident nights in the European Union in general, and an appreciable drop in non-resident overnight stays is likely to be offset by a more moderate increase in nights spent by residents. France is one example of this compensatory effect, having recorded a drop of 1.8% in nights spent by non-residents in hotels and similar establishments coupled with a 1.3% rise in resident overnight stays in 2001, amounting to a slight increase of 0.1% over 2000 in total nights spent by tourists.

By the end of the first three quarters of 2001, tourism receipts and expenditure were up by 3.9% and 3.3% respectively on the 2000 figures. Spain was the Member State with the biggest surplus on international tourism at the end of this period.

1) EU except Greece, Ireland and Sweden

## Drop in inbound tourism in the last quarter of 2001



Note: GR, IRL and S excluded

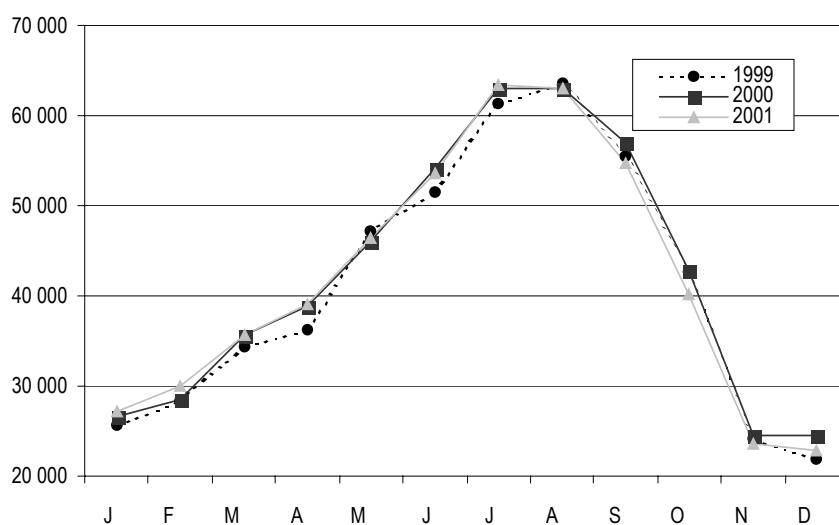
Graph 2: Overnight stays by residents in hotels and similar establishments in EU countries ('000)

Unlike previous years, 2001 saw disparate trends in overnight stays by residents and non-residents in the European Union (except Greece, Ireland and Sweden). In the first three quarters, the trend in nights spent by non-residents remained close to that of 2000. The break in this trend came in September with a drop which continued into the last quarter (-5.7%), the 2001 curve falling to below 1999 levels. In 2001, Italy (+2.7%) and Luxembourg (+2.6%) showed the highest annual increases in nights spent by non-residents in hotels and similar establishments. Conversely, the Netherlands (-5.6%), Germany (-4.8%), Portugal (-4.4%) and the United Kingdom (-4.1%) saw a significant fall-off in non-resident overnight stays.

Resident overnight stays followed a different trajectory. Before 11 September the 2001 figures had been below those of 2000. The trend reversed in the last quarter, clearly reflecting the substitution effect between

domestic and inbound tourism. Resident overnight stays in the last quarter ended 2.7% up on their 2000 levels. In 2001, Italy (+4.5%) and France (+1.3%) recorded the highest annual increases in nights spent by residents in hotels and similar establishments, and the United Kingdom the sharpest drop, at -7.2%.

Periods of strong concentration of resident overnight stays do not necessarily coincide with those of non-resident stays. In both Spain and Italy, for example, the peak period (over 10% of the annual total per month) for non-resident nights extends from May to September. Concentrations of nights spent by residents, on the other hand, are most marked from June to August in Italy, and from July to September inclusive in Spain. In Austria, the winter holiday months of January, February and March are all peak periods for non-resident nights, but only February sees a strong increase in resident nights.



Note: GR, IRL and S excluded

Graph 3: Overnight stays by non-residents in hotels and similar establishments in EU countries ('000)

('000)	Resident nights						Non-resident nights					
	Hotels and similar establishments			Other collective accommodation establishments <sup>(1)</sup>			Hotels and similar establishments			Other collective accommodation establishments <sup>(1)</sup>		
	1999	2000	% 00/99	1999	2000	% 00/99	1999	2000	% 00/99	1999	2000	% 00/99
B	3 652	4 045	10.8	9 460	9 644	1.9	9 749	10 184	4.5	5 617	5 343	-4.9
DK	4 417	4 599	4.1	10 829	10 567	-2.4	4 350	4 611	6.0	5 616	5 398	-3.9
D	154 419	163 429	5.8	91 423	92 639	1.3	30 913	34 641	12.1	7 602	7 779	2.3
EL	14 381	14 667	2.0	405	500	23.5	45 490	46 636	2.5	592	760	28.4
E	81 504	83 382	2.3	:	27 368	:	149 036	143 762	-3.5	:	90 135	:
F	108 774	114 059	4.9	62 512	60 922	-2.5	71 768	77 014	7.3	37 071	32 650	-11.9
IRL	6 938	6 786	-2.2	2 098	2 362	12.6	14 327	17 482	22.0	:	15 637	:
I	128 238	132 774	3.5	53 409	62 039	16.2	90 236	97 221	7.7	36 432	43 136	18.4
L	67	68	1.9	187	150	-20.1	1 136	1 139	0.3	1 303	1 174	-9.9
NL	13 829	14 027	1.4	41 994	41 283	-1.7	15 224	15 695	3.1	12 251	11 566	-5.6
A	17 241	18 031	4.6	8 225	8 211	-0.2	53 123	53 617	0.9	10 708	10 851	1.3
P	9 397	9 693	3.1	6 846	6 477	-5.4	23 331	24 102	3.3	1 749	1 683	-3.8
FIN	9 600	9 786	1.9	2 204	2 190	-0.6	3 271	3 562	8.9	503	504	0.2
S	16 192	16 586	2.4	15 062	14 570	-3.3	4 516	4 679	3.6	4 085	3 975	-2.7
UK	93 000	142 540	53.3	94 830	:	:	55 794	53 722	-3.7	21 807	:	:
IS	:	:	:	:	16	:	122	131	7.5	:	37	:
LI	3	3	7.5	5 309	5 404	1.8	5 208	4 967	-4.6	2 607	2 502	-4.0
NO	11 319	11 398	:	22 343	:	:	18 544	:	:	13 319	:	:
CH	13 134	:	:	:	:	:	:	:	:	:	:	:

<sup>(1)</sup> Only campsites for France and only campsites and holiday dwellings for Spain

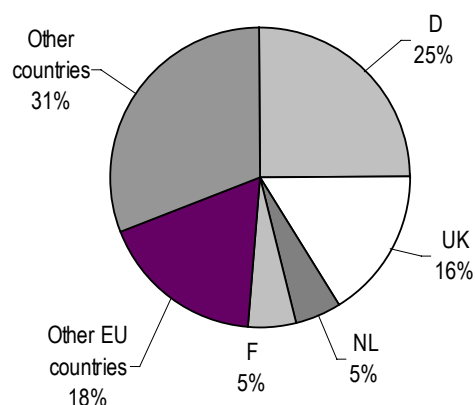
Table 1: Overnight stays by residents and non-residents in hotels and similar establishments and in other collective accommodation establishments

## Main countries of origin of tourists

In 2000, intra-EU tourist flows accounted for 69% of all nights spent by non-residents in hotels and similar establishments. Germany remained the leading source of outbound tourists in the EU, accounting for more than 25% of all non-resident overnight stays in hotels and similar. The United Kingdom (16%), the Netherlands (5%) and France (5%) were also in this leading group. Together these four countries provided 51% of EU inbound tourism in 2000.

German tourists were Austria's primary market, accounting for 59% of all non-resident overnight stays there in hotels and similar establishments and also for 33% in Spain, 33% in Italy and 25% in Greece. British tourists took a large slice of the Irish market, being responsible for 35% of all non-resident overnight stays in hotels and similar establishments in Ireland, 30% in Portugal, 23% in Belgium, 22% in the Netherlands and 21% in France. Swedish tourists were the main market for both Denmark and Finland, accounting for 27% and 14% respectively of all nights spent there by non-residents in hotels and similar establishments. For Sweden, however, the leading source of tourism was Norway, providing 14% of non-resident tourists in terms of overnight stays. Belgian tourists were most frequent in Luxembourg, accounting for 25% of all non-resident

nights in hotels and similar establishments. The USA was the leading source of customers in Germany and the United Kingdom, providing 15% and 27% respectively of total non-resident overnight stays in hotels and similar establishments.



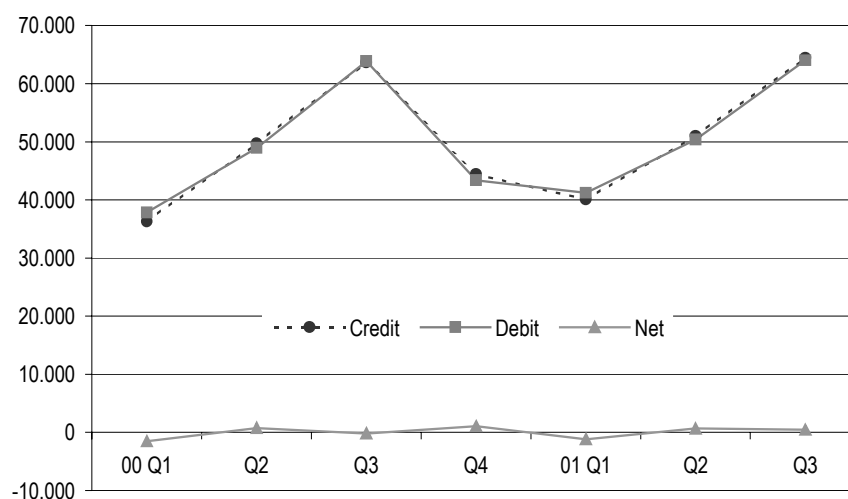
Graph 4: Main countries of origin of tourists in the 15 EU destinations, 2000

Table 2: Main countries of origin of tourists, 2000

	1 <sup>st</sup> Market		2 <sup>nd</sup> Market		3 <sup>rd</sup> Market		4 <sup>th</sup> Market		Share of the top four markets
	Country	%	Country	%	Country	%	Country	%	
EU-15	D	25.2	UK	16.3	USA	9.7	NL	4.8	55.2
Eurozone	D	27.0	UK	18.1	USA	8.0	NL	4.8	57.3
B	UK	22.5	NL	15.3	F	12.5	D	11.8	63.5
DK	S	26.6	N	15.6	D	10.3	UK	9.6	62.1
D	USA	14.9	UK	10.6	NL	10.0	I	6.9	40.4
EL	D	25.1	UK	13.1	A	4.0	NL	3.8	45.9
E	D	33.2	UK	27.3	F	5.7	I	4.4	70.7
F	UK	21.0	USA	14.3	D	10.9	I	10.1	55.4
IRL	UK	35.1	USA	30.4	D	6.9	I	5.5	75.9
I	D	32.9	USA	9.6	UK	8.4	F	7.6	57.7
L	B	25.4	D	13.3	NL	13.3	F	10.6	62.5
NL	UK	22.0	D	18.9	USA	13.7	F	5.0	58.3
A	D	59.4	NL	6.9	UK	5.1	CH	4.4	75.8
P	UK	29.7	D	20.8	E	7.6	NL	7.5	65.6
FIN	S	14.2	D	10.6	UK	9.9	USA	6.9	40.9
S	N	14.0	D	13.1	UK	10.0	USA	9.2	34.1
UK	USA	26.8	D	9.6	F	6.5	NL	4.7	44.7
IS	D	20.6	UK	12.2	USA	10.8	S	8.1	51.7
LI	D	40.0	CH	20.9	A	5.2	USA	5.1	70.9
NO	D	16.9	DK	16.4	S	12.4	UK	9.5	55.1
EEA	D	25.1	UK	16.3	USA	9.7	NL	4.8	55.1
CH	D	33.9	USA	10.9	UK	9.5	F	6.0	59.4

Note : Data based on the number of nights spent in hotels and similar establishments in the last available year.

## A surplus on international tourism



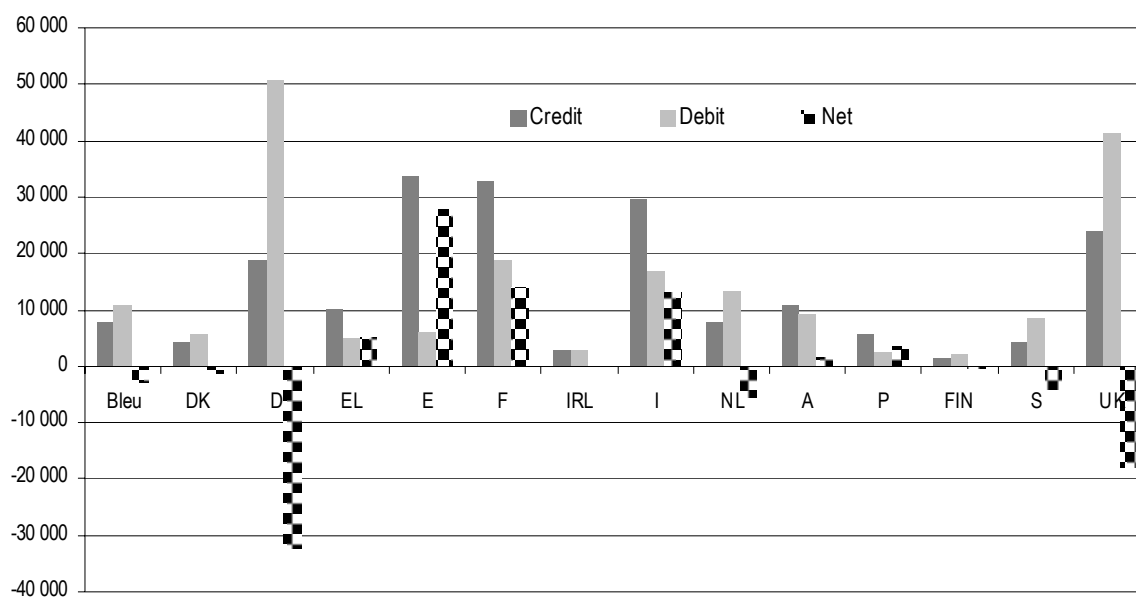
Graph 5: EU Travel item in the Balance of Payments (Mio Euro)

Despite a surplus of EUR 97 million, the "travel" heading of the EU balance of payments showed negative growth in 2000, at -97% of the 1999 surplus. Receipts (EUR 194.1 billion) were up by 12.9%, but expenditure (EUR 194 billion) showed an even bigger increase of 15% over the 1999 figure. The drop in the "travel" heading in the EU in 2000 was due primarily to the heavy deficit recorded in the first quarter (EUR -1.5 billion). The third-quarter deficit (EUR -198 million)

made a lesser contribution. The second and last quarters saw positive balances of EUR 776 million and 1.04 billion respectively. At almost EUR 28 billion, Spain recorded the biggest surplus in international tourism in 2000. France (approximately EUR 14 billion) and Italy (almost EUR 13 billion) also recorded surpluses, but were well below Spain's figure. Germany showed the biggest deficit of more than EUR -32 billion, followed by the United Kingdom (approximately EUR -17 billion).

The balances of the first three quarters of 2001 were already more auspicious than those of 2000: the usual first-quarter deficit was smaller (at EUR -1.1 billion) and

there were surpluses (EUR 636 and 436 million respectively) in the following two quarters.



Graph 6: EU Travel item in the Balance of Payments (Mio Euro), 2000

### Accommodation structure

	Hotels and similar establishments				Other collective accommodation establishments <sup>(2)</sup>			
	Number of establishments		Number of bed-places		Number of establishments		Number of bed-places	
	1999	2000	1999	2000	1999	2000	1999	2000
B	2 015	1 998	119 365	119 165	1 646	1 635	517 918	513 564
DK <sup>(1)</sup>	464	466	60 513	62 107	621	622	318 249	319 756
D	38 701	38 551	1 561 830	1 590 332	16 632	17 032	1 466 018	1 488 662
EL	8 168	8 342	597 855	607 614	344	:	93 941	:
E	16 229	16 287	1 299 021	1 315 697	:	173 415	:	1 306 541
F	18 563	18 474	1 485 863	1 178 348	816	841	2 977 325	2 970 306
IRL	5 692	5 449	135 473	138 579	2 540	2 482	54 706	57 996
I <sup>(3)</sup>	33 341	33 361	1 807 275	1 854 101	35 856	83 858	1 816 616	2 055 897
L	325	319	14 449	14 415	297	291	50 803	50 283
NL	2 826	2 858	169 749	174 314	3 595	3 651	965 322	968 469
A	15 378	15 865	576 602	588 213	5 290	5 588	328 222	346 197
P	1 772	1 786	216 828	222 958	244	263	268 455	261 949
FIN	1 004	1 011	114 892	117 322	524	517	33 709	33 535
S	1 898	1 906	184 970	188 289	1 602	1 585	67 287	66 874
UK	51 300	50 549	1 176 226	1 154 580	:	:	:	:
IS	:	244	:	:	:	378	:	:
LI	:	:	:	:	:	:	:	:
NO	1 162	1 166	137 653	140 580	1 212	1 213	364 397	360 280
CH	5 826	:	260 592	:	94 081	:	812 241	:

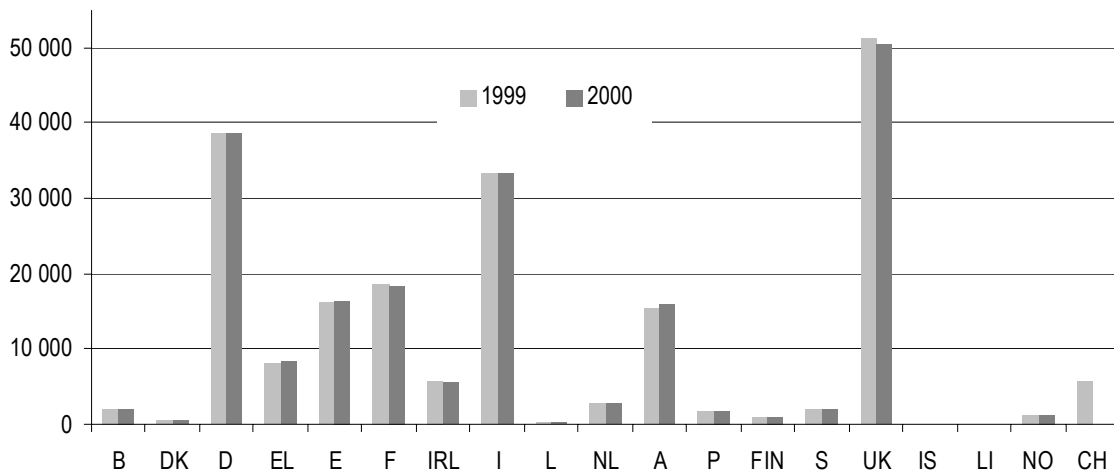
(1) Only establishments with 40 bed-places or more; (2) Only campsites for France and only campsites and holiday dwellings for Spain;

(3) Methodological changes in 2000 in the census of other collective accommodation establishments (Holiday dwellings) in Italy in the Trentino-Alto and Veneto regions.

Table 3: Capacity of collective accommodation establishments

In 2000 there were slightly more than 197 000 hotels and similar establishments, providing 9.3 million bed-places, in the EU. With 571 fewer establishments, the number of hotels and similar premises across the EU remained stable overall (-0.3%) in 2000. Austria saw the biggest increase in numbers of hotels, at +3.2%, followed by Greece (+2.1%). The number of hotels fell in Ireland (-4.3%), Luxembourg (-1.8%) and the United Kingdom (-1.5%). Bed capacity in hotels and similar

was down by 2.3% in the EU in 2000 compared with 1999, with France (-20.7%) showing the most severe drop. Portugal recorded the biggest upturn in bed-places in this category, at 2.8%. In 2000, Italy was still the Member State with the widest coverage, with a bed capacity of more than 1.8 million in hotels and similar establishments. Germany, France, Spain and the United Kingdom each had over a million bed-places in this category.

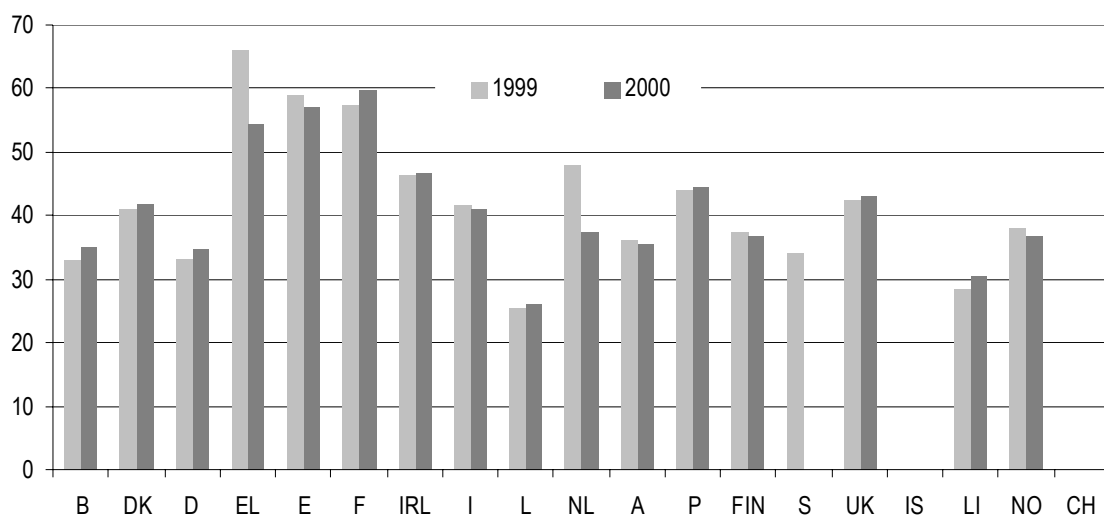


Graph 7: Number of hotels and similar establishments

## Occupancy rates in hotels and similar establishments

The net uptake of bed-places in hotels and similar establishments in the EU remained stable overall in 2000, at an average annual rate of almost 42%. Summer saw the highest rates of occupancy of bed-places except in Austria, where the peak month was February (56%). Periods of peak occupancy of bed-places in hotels and similar establishments seem to be

particularly long in France and Spain, lasting from March or even February to November. France and Spain are also the countries with the highest rates of uptake of bed-places, with average annual rates of 59.8% and 57% respectively in 2000. The lowest average rates were observed in Luxembourg (26%), Germany (34.7%) and Belgium (35%).



Graph 8: % Net use of bed-places in hotels and similar establishments

Countries	January	February	March	April	May	June	July	August	September	October	November	December
B	22.8	28.7	31.2	38.5	37.8	39.5	39.5	43.9	39.9	35.8	32.8	29.6
DK	24.9	30.7	33.6	35.9	44.2	49.9	72.1	57.3	47.2	39.8	39.1	26.9
D	23.0	27.3	27.8	31.6	37.9	41.2	42.1	44.5	47.1	38.7	28.8	26.7
EL	32.5	35.1	32.3	40.0	61.3	72.9	85.8	94.5	76.5	54.9	34.0	33.1
E	40.8	48.2	54.1	58.3	56.3	63.1	68.9	75.7	68.6	58.3	49.1	42.5
F	46.9	50.8	56.0	58.8	61.1	69.0	67.4	71.3	68.9	62.1	55.2	49.7
IRL	26.0	34.0	41.0	47.0	50.0	55.0	61.0	63.0	59.0	47.0	41.0	35.0
I	29.5	32.5	34.1	37.5	35.9	50.6	60.7	69.9	51.2	36.2	25.1	26.9
L	20.5	22.3	20.0	26.4	27.2	30.2	31.9	30.9	28.9	27.8	25.3	20.2
NL	33.0	37.0	42.0	:	:	:	:	:	:	:	:	:
A	47.9	56.0	43.6	26.3	23.2	33.5	41.7	47.7	35.1	24.6	20.3	28.8
P	25.8	32.9	41.9	48.2	47.6	51.2	57.9	66.6	56.1	45.9	34.0	26.9
FIN	29.2	36.0	40.1	35.7	33.7	39.7	48.0	42.8	37.7	34.4	34.4	31.0
S	:	:	:	:	:	:	:	:	:	:	:	:
UK	32.0	34.0	37.0	43.0	45.0	49.0	54.0	57.0	50.0	45.0	36.0	34.0

Table 4: Net use of bed-places in hotels and similar establishments (%), 2000

## ➤ 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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