

# Tourism in Europe — Trends 1995-98



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2000 EDITION

# Tourism in Europe – Trends 1995-98



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**Yves Franchet**  
**Director-General**

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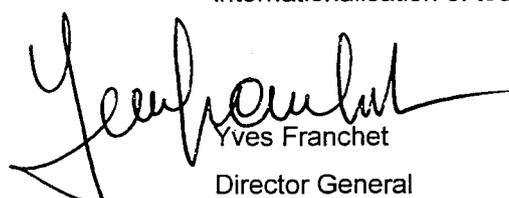
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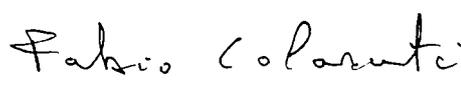
Tourism continues to grow in Europe, both at domestic and intra-European level, and also from third countries. The fact that Europe remains the main tourism region in the world, combined with an intensification of competition between countries and regions of the world to attract tourists, has led to an increased awareness of the role and impact of tourism in the economy and on employment as well as its social and environmental implications. This creates further needs for statistics which are harmonised, available at regular intervals and which are more detailed.

The period analysed in this publication is 1995-1998. The growth in tourism in Europe can be observed in both monetary and physical flows. Employment in hotels and restaurants has increased during the same period and also its share of total employment. The number of EU tourists travelling to the Mediterranean partner countries and the Central European countries is also growing.

This publication provides the reader with recent tourism trends in the EU and EFTA countries, Central European countries and the Mediterranean partner countries. Data collected in the EU Member States have during the last four years been adapted in terms of definitions and methods used in order to be harmonised and comparable at European level, following the implementation of the Council Directive 95/57/EC on the collection of statistical information in the field of tourism. This represents an important step in establishing a harmonised information system on tourism at Community level.

We hope that the dissemination of the results of this work, launched and supported by the European Commission, will help improving the knowledge of one of the most complex and fast growing sectors of the economy and will provide a useful contribution to decision-makers, businesses and researchers facing the challenge of competitiveness in the perspective of increasing internationalisation of tourist flows.

  
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Eurostat

  
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## INTRODUCTION

In 1995 the Council of the European Union adopted a Directive (95/57/EC)<sup>1</sup> on the collection of statistical information in the field of tourism. The new harmonised data series present data on the capacity of tourist collective accommodation establishments; occupancy in these establishments subdivided into domestic and inbound tourism and on tourism demand, subdivided into domestic and outbound tourism, relating to volume of flows, characteristics of trips, tourist profile and tourist spending.

The present report on tourism trends in Europe, including specific sections on tourism in the Mediterranean partner countries and the Central European countries, is a first analysis-oriented publication containing to a great extent the now harmonised data, mainly on the supply side, collected in the frame of the Council Directive. The intention is to produce this type of publication on an annual basis. In next year's edition, when the transition period for Member States to collect data from the demand side will end, the intention is to include also the new harmonised information on EU residents' tourism demand and its characteristics.

In the effort of adhering and implementing the Directive, several Member States have since its adoption been changing their methodology concerning the definitions, the variables and the collection methods for statistics on tourism. This effort towards a greater data harmonisation within the EU has sometimes implied breaks in the time series concerning the period from 1995 to 1998. Explanatory footnotes to statistical tables and graphs keep the readers aware about this fact and contribute to the transparency of the statistical information reported in the publication. Also, the economic analysis has to be read bearing in mind these indications.

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<sup>1</sup> OJ N° L291, 6.12.1995, p.32.



## **PART ONE**

# ***GENERAL TOURISM TRENDS***



### 1.1 General economic trends

In 1998 the EU economy recorded a GDP increase of 2.9% - in terms of volume -, showing a slight improvement in relation to the previous years (+2.7% in 1997 and +1.8% in 1996).

The 1998 growth of the economy was led by exports of goods and services, which moved upwards by 6.1%. The performance, although good, did not match the positive trend registered the year before, when exports grew by 9.9%. In addition to growing exports, gross fixed capital formation increased of 4.4% in 1998, improving the upward trend showed the year before (+1.3%). Also private national consumption registered a more sustained growth in 1998 with respect to the previous year (+2.7% in 1998 compared to +2% in 1997). General government consumption showed a very moderate increase in 1998 (+0.6%), thus confirming the trend emerged in 1997 (+0.2%).

The economic growth was accompanied by a stable rate of inflation. In 1998 consumer prices increased by 1.3% compared to 1997. Consumer prices in the sectors of hotels, cafes and restaurants activities showed a faster growth than the general consumer prices, rising by 2.7%. The other main sector related to tourism activities, the transport sector,

did not record the same upward trend in prices, showing a substantial stability (+0.7%).

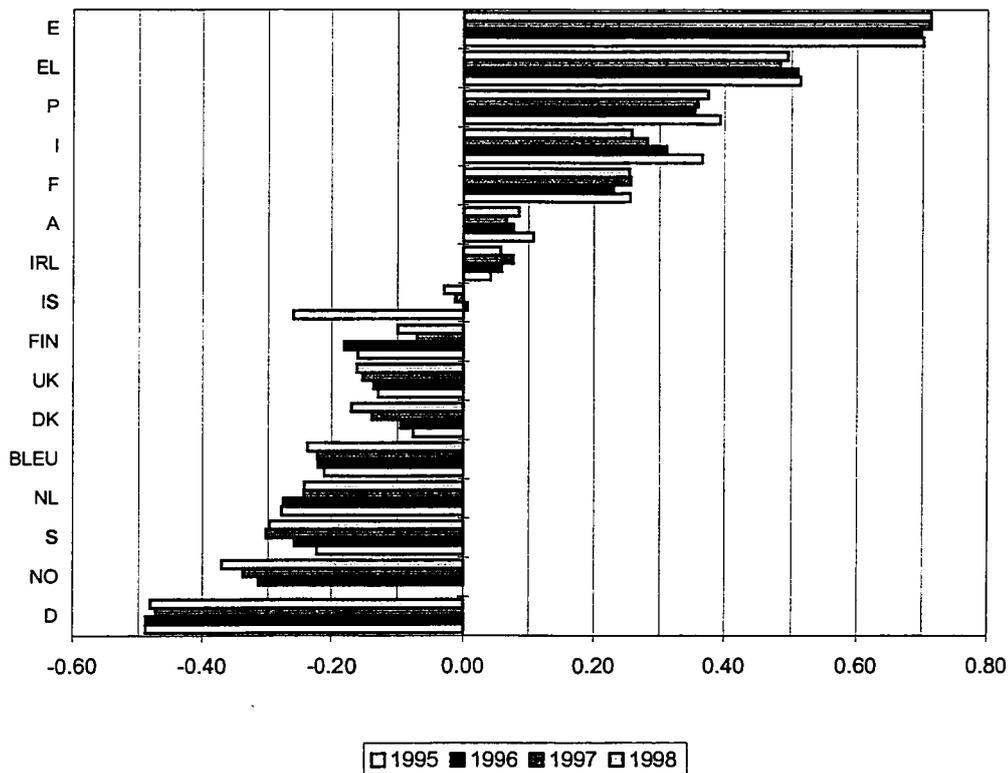
### 1.2 Travel receipts and expenditure

The importance of tourism in Europe is shown by the great amount of money that is transferred among the EU countries and among each EU country with the rest of the world. By summing up international travel debits (expenditure) and credits (receipts) of the countries considered, there was a movement which exceeded ECU 309 billion in 1998.

In 1998 the four EU countries which bought the most tourism services abroad for over ECU 10 billion each were: Germany, with ECU 41.9 billion, the United Kingdom (ECU 29.6 bn), France (ECU 15.9 bn) and Italy (ECU 15.7 bn) (see table 1.1).

At the same time six countries sold their tourism services abroad for over ECU 10 billion each: France (ECU 26.7 bn), Spain (ECU 26.6 bn), Italy (ECU 26.6 bn), the United Kingdom (ECU 21.3 bn), Germany (ECU 14.7 bn) and Austria (ECU 10 bn). France, Germany, Italy and the United Kingdom were present in both groups. They represented 67.6% of travel services bought abroad (including intra-Community flows) and

Graph 1.1 - Horizontal tourism index, 1995-1998



Source: Eurostat.

**Table 1.1 - Travel item of the Balance of payments (Mio ECU), 1995-1998**

	1995		1998		Variations 1995-1998 (%)	
	Credit	Debit	Credit	Debit	Credit	Debit
<b>EU-15</b>	<b>125 446</b>	<b>122 361</b>	<b>156 936</b>	<b>152 639</b>	<b>25.1</b>	<b>24.7</b>
<b>EUR-11</b>	<b>102 292</b>	<b>95 039</b>	<b>124 396</b>	<b>110 563</b>	<b>21.6</b>	<b>16.3</b>
BLEU (1)	4 475	6 869	4 863	7 906	8.7	15.1
DK	2 814	3 275	2 868	4 046	1.9	23.5
D	13 698	39 880	14 676	41 925	7.1	5.1
EL	3 146	1 011	4 620	1 563	46.9	54.6
E	19 472	3 420	26 666	4 470	36.9	30.7
F	21 064	12 497	26 691	15 873	26.7	27.0
IRL	1 687	1 552	2 364	2 106	40.1	35.7
I	20 946	9 711	26 640	15 707	27.2	61.7
NL	5 021	8 908	6 068	9 967	20.9	11.9
A	10 936	8 810	10 034	8 449	-8.2	-4.1
P	3 709	1 616	4 755	2 159	28.2	33.6
FIN	1 284	1 776	1 639	2 001	27.6	12.7
S	2 642	4 156	3 721	6 869	40.8	65.3
UK	14 552	18 880	21 331	29 598	46.6	56.8
IS	126	215	331	351	162.9	63.3
LI	:	:	:	:	:	:
NO	:	:	1 868	4 065	:	:
CH	:	:	:	:	:	:

(1) Belgium-Luxembourg Economic Union.

Source: Eurostat.

56.9% of travel services sold abroad by EU countries.

The most significant trends between 1995 and 1998 in the European countries are that:

- both credits and debits increased by approximately 25% in the EU and by 21.6% and 16.3% respectively in the euro-zone, thus confirming a further growth of tourism in Europe;
- the most dynamic countries in terms of percentages variations both in credits and debits were Sweden, the United Kingdom and Greece, all of them showing growth rates for international travel receipts higher than 40% and growth rates for international travel expenditures higher than 50%. On the other hand, Austria reported decreases both in credits and, to a more limited extent, in debits;
- in Denmark and Italy international expenditures grew to a significantly faster pace than international receipts.

Table 1.2 shows, in absolute values, the net account for the travel item of the Balance of payments and a composite index ("the horizontal tourism index", HTI in the table) varying between -1 (countries which only import travel services) and +1 (countries which only export travel services). The value of 0 represents the equilibrium situation between debits and credits.

Countries that have a surplus in the travel item account are easily identified at the top side of graph 1.1. Besides Spain (0.71) and Greece (0.49), in 1998 other three countries had a composite index higher than 0.2. They were Portugal (0.38), Italy (0.26) and France (0.25). Among these countries, the travel account surplus remained substantially stable in Spain and France, while showed a declining trend in Greece, Portugal and, to a greater extent, Italy.

Among those countries that mainly imported travel services, Germany confirmed to be the strongest net spender with a 1998 composite index of -0.48. Norway (-0.37), Sweden (-0.30), the Netherlands (-0.24) and BLEU<sup>1</sup> (-0.24) followed. The highest variations between 1995 and 1998 in the horizontal tourism index occurred in Denmark (from -0.08 to 0.17) and Iceland (from -0.26 to -0.03).

Graph 1.2 shows the variations of flows of both expenditures and receipts between 1995 and 1998.

Along the X-axis, there are the variations due to tourism services exports (credits), and along the Y-axis the one due to tourism services imports (debits).

Above the main diagonal in the first square, the graph shows those countries that had a positive development in tourism receipts, but an even

<sup>1</sup> Belgium-Luxembourg Economic Union.

stronger growth in tourism expenditures. This was the case for eight EU countries. Among them, the phenomenon is more evident in Denmark, Italy and Sweden.

Below the main diagonal - but still in the first square - there are countries showing a stronger growth in international travel receipts (credits) than that recorded by international travel expenditures (debits). Germany, Spain, Ireland, the Netherlands and Finland were located in this area. Finally, Austria is located in the third square that includes countries showing a decrease both in credits and in debits.

The fact that most of the countries appear in the first square, with a positive development of both tourism receipts and expenditures, confirms the growth of international tourism in Europe during the period.

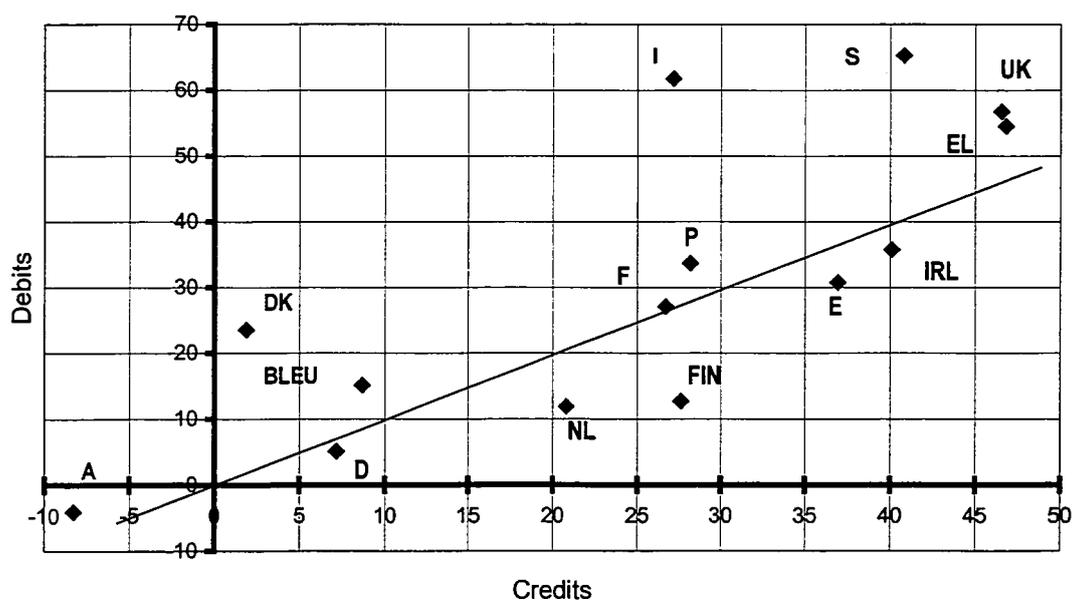
**Table 1.2 - Balance of the travel item (Mio ECU) and horizontal tourism index (HTI), 1995-1998**

	1995		1998	
	Net	HTI	Net	HTI
BLEU (1)	-2 394	-0.21	-3 043	-0.24
DK	- 461	-0.08	-1 178	-0.17
D	-26 182	-0.49	-27 249	-0.48
EL	2 135	0.51	3 057	0.49
E	16 052	0.70	22 196	0.71
F	8 567	0.26	10 818	0.25
IRL	135	0.04	258	0.06
I	11 235	0.37	10 933	0.26
NL	-3 887	-0.28	-3 899	-0.24
A	2 126	0.11	1 585	0.09
P	2 093	0.39	2 596	0.38
FIN	- 492	-0.16	-362	-0.10
S	-1 514	-0.22	-3 148	-0.30
UK	-4 328	-0.13	-8 267	-0.16
IS	- 89	-0.26	-20	-0.03
LI	:	:	:	:
NO	:	:	-2 197	-0.37
CH	:	:	:	:

(1) Belgium-Luxembourg Economic Union.

Source: Eurostat.

**Graph 1.2 - Variations of debits and credits in the travel item of the Balance of payments (%), 1995-1998**



Source: Eurostat.

### 1.3 Employment trends in hotels and restaurants

The tourism sector is very heterogeneous, comprising many types of economic activities that are mainly or partly dependent on tourism. In fact, figures on tourism employment concern hotels and restaurants, transport and travel agency activities, retail trade, tourist promotion boards, etc. Tourism employment can constitute the whole or parts of these activities and the shares normally differ between countries and regions. Because of this complex situation, it is rather difficult to precisely measure the number of persons working in tourism related activities.

Data and comments reported in the present section focus on employment in Hotels and restaurants as defined in the Community classification of activities (NACE Rev. 1, division 55).

Employment in hotels and restaurants substantially concur in the total employment at European level.

The share of employment in this sector in relation to total employment was 4.0% in 1998. At national level this share ranged from a maximum of 6.3% in Greece to a minimum of 2.7% in Sweden (see table 1.3). It contributed 6.1% of total employment in Spain, 5.7% in Austria and 5.6% in Ireland (1997).

Figures showed considerable employment increases between 1995 and 1998 in the sector compared to the performance of overall employment. Employment in hotels and restaurants increased by 5.6% in the EU as a whole and by 5.1% in the euro-zone. In the same period total employment experienced a lower growth: 1.6% in the EU and 1.2% in the euro-zone.

Consequently, the share of the sector compared to total economy has grown slightly. In the EU it increased from 3.9% in 1995 to 4.0% in 1998; similarly, in the euro-zone it increased from 3.8% to 3.9%.

**Table 1.3 - Employment in hotels and restaurants ('000), 1995-1998**

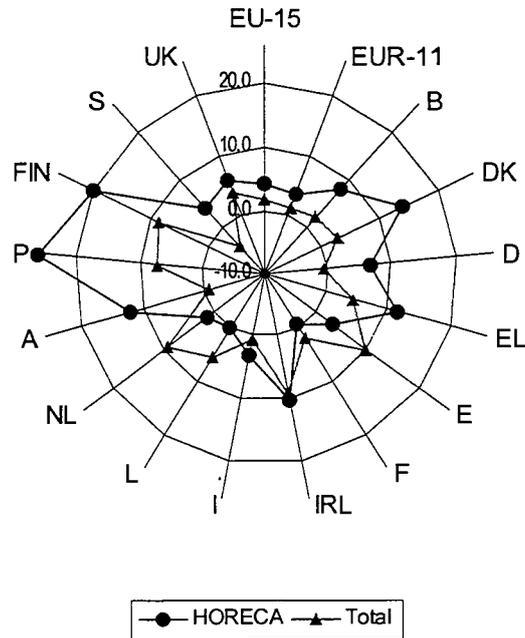
	Employment in hotels and restaurants ('000)		Share of total employment (%)		Variations of employment in hotels and restaurants (%)
	1995	1998	1995	1998	1995-1998
EU-15 (1)	5 741	6 060	3.9	4.0	5.6
EUR-11 (1)	4 220	4 435	3.8	3.9	5.1
B	123	133	3.3	3.5	8.1
DK	64	73	2.5	2.8	14.1
D	1 033	1 101	2.9	3.1	6.6
EL	218	243	5.9	6.3	11.5
E	766	792	6.4	6.1	3.4
F	726	720	3.3	3.2	-0.8
IRL (2)	68	75	5.5	5.6	10.3
I	829	854	4.2	4.3	3.0
L	8	8	5.0	4.7	0.0
NL	235	238	3.5	3.2	1.3
A	183	205	5.0	5.7	12.0
P	198	249	4.7	5.5	25.8
FIN	50	60	2.5	2.8	20.0
S	100	104	2.5	2.7	4.0
UK	1 139	1 205	4.5	4.6	5.8
IS	:	:	:	:	:
LI	:	:	:	:	:
NO	60	:	3.0	:	:
CH	:	:	:	:	:

(1) Rounding errors.

(2) 1997 data for 1998.

Source: Eurostat (Labour Force Survey).

**Graph 1.3 - Variations of employment in hotels and restaurants (HORECA) and of total employment (%), 1995-1998**



Source: Eurostat (Labour Force Survey).

This trend can be generalised for several EU countries (see graph 1.3). In comparison with 1995, in 1998 most countries experienced stronger increases of employment in hotels and restaurants than in total employment, thus strengthening the role of tourism in their economy as regards employment.

Portugal and Finland experienced the highest percentage growths of employment in hotels and restaurants (nearly 26% and 20% respectively). Greece showed the third highest growth rate (+14.1%).

Categorising employment by sex, in the EU as a whole female employment slightly prevails on male employment in the hotels and restaurants sector (see table 1.4 and graph 1.4). However, within the EU there is a group of countries in which female employment is highly predominant, with a peak of over 70% in Finland and shares of over 60% in the Denmark, Austria, Sweden and the United Kingdom. On the other hand, in the EU Mediterranean countries

(Greece, Spain, Italy and France) and in Belgium, male employment still prevails.

Between 1995 and 1998, female employment increased more than male employment in percentage terms: 6.8% and 4.3% respectively in the EU and 7.4% and 2.8% respectively in the euro-zone. However, male employment registered peak increases at national level. The highest growths were recorded in Denmark (28.6%) and Finland (21.4%). On the other side, Portugal registered the highest increase in female employment (44.6%).

Full-time employment greatly prevails on part-time employment in the hotels and restaurants sector in Europe. In 1997, at EU level, only one person out of four was a part-time worker; at the euro-zone level, only one person out of five (see graph 1.5).

However, the situation varies considerably at country level, where, in 1997, the share of part-time job ranged from a maximum of 59% in the Netherlands to a minimum of 4.7% in Greece (see table 1.5).

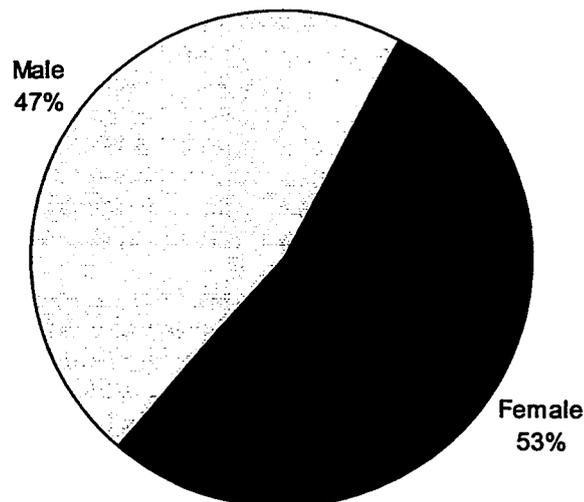
**Table 1.4 - Employment in hotels and restaurants by sex, 1995-1998**

	Absolute values ('000)				Share (%)		Variations (%)	
	1995		1998		1998		1995-1998	
	Male	Female	Male	Female	Male	Female	Male	Female
EU-15	2 732	3 008	2 850	3 212	47.0	53.0	4.3	6.8
EUR-11	2 103	2 117	2 162	2 274	48.7	51.3	2.8	7.4
B	58	64	69	64	51.9	48.1	19.0	0.0
DK	21	43	27	46	37.0	63.0	28.6	7.0
D	449	585	471	629	42.8	57.2	4.9	7.5
EL	131	87	141	102	58.0	42.0	7.6	17.2
E	445	321	442	350	55.8	44.2	-0.7	9.0
F	372	354	375	346	52.0	48.0	0.8	-2.3
IRL (1)	29	38	32	43	42.7	57.3	10.3	13.2
I	457	372	455	399	53.3	46.7	-0.4	7.3
L	4	4	4	4	50.0	50.0	0.0	0.0
NL	112	123	115	124	48.1	51.9	2.7	0.8
A	66	117	79	126	38.5	61.5	19.7	7.7
P	97	101	103	146	41.4	58.6	6.2	44.6
FIN	14	36	17	43	28.3	71.7	21.4	19.4
S	43	57	42	63	40.0	60.0	-2.3	10.5
UK	434	705	478	727	39.7	60.3	10.1	3.1
IS	:	:	:	:	:	:	:	:
LI	:	:	:	:	:	:	:	:
NO	22	38	:	:	:	:	:	:
CH	:	:	:	:	:	:	:	:

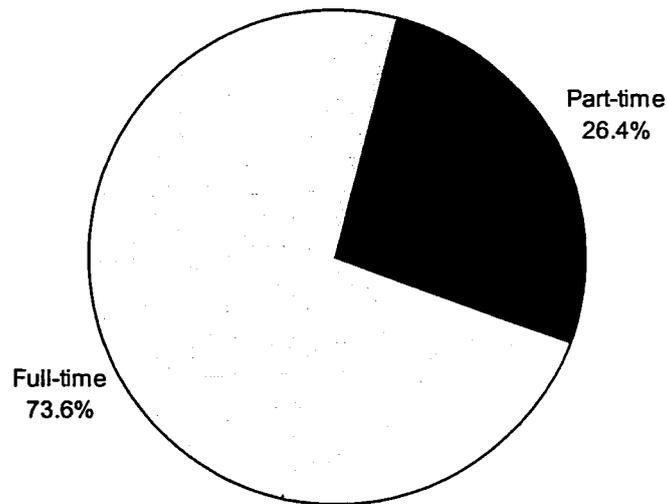
(1) 1997 data for 1998.

Source: Eurostat (Labour Force Survey).

**Graph 1.4 - Employment in hotels and restaurants by sex, share (%), 1998**



Source: Eurostat (Labour Force Survey).

**Graph 1.5 – Full-time and part-time employment in hotels and restaurants, share (%), 1997**


Source: Eurostat (Labour Force Survey).

**Table 1.5 - Full-time and part-time employment in hotels and restaurants, 1995-1997**

	Absolute values ('000)				Share (%)		Variations (%)	
	1995		1997		1997		1995-1997	
	Full-time	Part-time	Full-time	Part-time	Full-time	Part-time	Full-time	Part-time
EU-15	4 439	1 382	4 499	1 615	73.6	26.4	1.4	16.8
EUR-11	3 505	774	3 550	927	79.3	20.7	1.3	19.7
B	99	26	99	31	76.4	23.6	0.0	18.8
DK	38	26	42	37	53.1	46.9	10.3	41.9
D	835	218	865	300	74.2	25.8	3.7	37.4
EL	212	11	219	11	95.3	4.7	3.3	-5.4
E	687	85	677	108	86.2	13.8	-1.4	27.5
F	592	144	558	169	76.8	23.2	-5.7	17.2
IRL	52	17	54	22	71.3	28.7	4.7	28.7
I	753	87	781	102	88.4	11.6	3.7	17.8
L	7	1	8	1	91.5	8.5	7.3	25.4
NL	94	143	90	130	41.0	59.0	-4.8	-9.4
A	155	32	171	34	83.3	16.7	10.4	7.6
P	194	10	206	13	94.1	5.9	6.0	24.8
FIN	38	12	42	18	69.6	30.4	10.9	51.7
S	63	32	61	40	60.4	39.6	-4.3	25.0
UK	621	539	628	601	51.1	48.9	1.2	11.4
IS	:	:	:	:	:	:	:	:
LI	:	:	:	:	:	:	:	:
NO	:	:	:	:	:	:	:	:
CH	:	:	:	:	:	:	:	:

Source: Eurostat (Labour Force Survey).

Between 1995 and 1997, part-time employment increased with a faster pace than full-time employment, both at EU and euro-zone level: 16.8% against 1.4% in the EU and 19.7% against 1.3% in the euro-zone. With only few exceptions, similar trends occurred at national level. Moreover, some countries reported decreases in full-time employment but noticeable growths in part-time employment. Finland reported the greatest increase in part-time employment (nearly 52%). Denmark and Germany ranked the second and third place respectively with growths of almost 42% and over 37%. On the other hand, the Netherlands and Greece showed noticeable decreases (-9.4% and -5.4% respectively)

**PART TWO**

***TOURISM DEMAND TRENDS***



## 2.1 EU and EFTA countries

### 2.1.1 Occupancy in hotels and similar establishments

In 1998 resident and non-resident tourists spent over 1 158 million nights in hotels and similar establishments in the European Union, of which 52.5% were due to domestic tourism (see table 2.1 and graph 2.1). The number of nights spent in the euro-zone amounted to more than 905 million, of which 54.4% were due to domestic tourism.

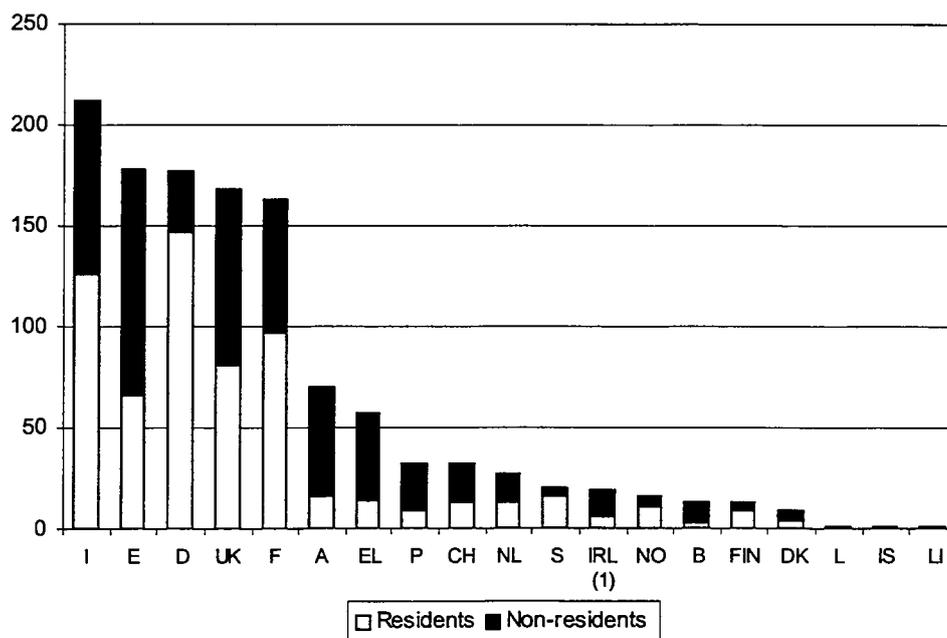
Adding Iceland, Liechtenstein, Norway and Switzerland, tourism flows in hotels and similar establishments reached 1 207.6 million nights; 52.4% of these was due to domestic tourism.

With more than 212 million nights Italy was the biggest country in terms of number of nights spent in hotels and similar establishments, representing by its own around 18% of the EU hotels tourism market. Spain ranked in second place with 178 million nights (15%). Germany, United Kingdom and France followed. These top five countries altogether captured 63.4% of all the nights spent in hotels and similar establishments in the EU.

The composition of tourism flows in terms of domestic and inbound tourism varied considerably from country to country. The small countries (Luxembourg and Liechtenstein) showed tourism almost entirely made up by non-residents (93.1% and 97.4% respectively). Besides them, there was a group of EU countries (Belgium, Greece, Ireland, Austria and Portugal) where inbound tourism represented around 75% of the total flows of tourists in hotels and similar establishments. Also in Iceland, the inbound component amounted to around 70% of the total tourism flows. On the other hand, Germany, Sweden and Finland had the lowest percentage shares of inbound tourism with respect to the total number of nights spent in hotel accommodation (see graph 2.2).

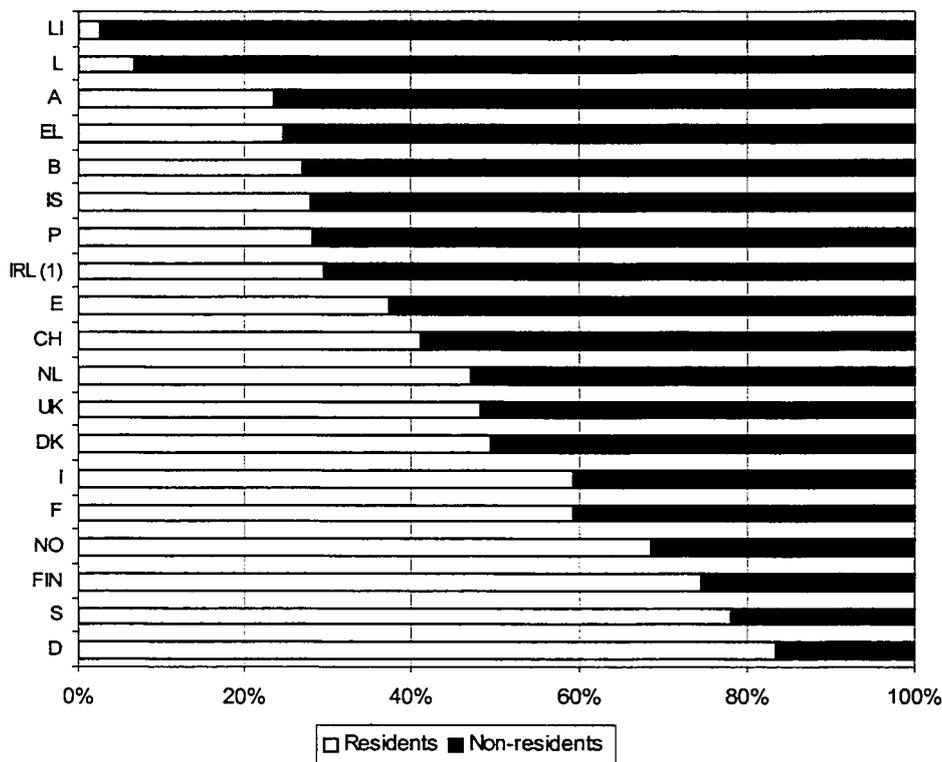
Considering domestic tourism, in 1998 Germany recorded the highest number of nights spent by residents. They were over 147 million, that is 24% of domestic overnight stays in hotels in the EU. Italy recorded the second best performance (nearly 126 million nights), followed by France (96.7 million nights) and the United Kingdom (81 million nights). These four countries represented almost three-quarters of the total number of nights spent by resident tourists in hotel accommodation.

**Graph 2.1 - Nights spent in hotels and similar establishments in the EU and EFTA countries, residents and non-residents, Mio, 1998**



(1) 1997 data.  
Source: Eurostat.

**Graph 2.2 - Domestic and inbound tourism in hotels and similar establishments in the EU and EFTA countries, share (%), 1998**



(1) 1997 data.  
Source: Eurostat.

**Table 2.1 - Nights spent in hotels and similar establishments in the EU and EFTA countries, residents and non-residents, 1995-1998**

	1995			1998			Variations 1995-1998 (%)		
	Residents	Non-residents	Total	Residents	Non-residents	Total	Residents	Non-residents	Total
EU-15 (1)	588 838 978	513 057 210	1 101 896 188	607 922 478	550 275 808	1 158 198 286	2.9	6.8	4.7
EUR-11 (1)	467 823 020	375 884 061	843 707 081	492 895 579	412 208 501	905 104 080	4.5	8.7	6.4
B	3 053 572	7 899 846	10 953 418	3 497 946	9 482 708	12 980 654	14.6	20.0	18.5
DK (2)	6 291 700	5 884 200	12 175 900	4 339 465	4 462 299	8 801 764	3.3	-0.2	1.5
D	145 184 820	27 184 620	172 369 440	147 276 000	29 738 000	177 014 000	1.4	9.4	2.7
EL	11 908 240	37 473 643	49 381 883	13 984 434	42 565 008	56 549 442	17.4	13.6	14.5
E	58 281 364	101 000 000	159 281 364	66 470 639	111 737 776	178 208 415	14.1	10.6	11.9
F	90 348 829	54 339 000	144 687 829	96 696 041	66 329 694	163 025 735	7.0	22.1	12.7
IRL (3)	6 698 000	11 348 000	18 046 000	5 583 000	13 220 000	18 803 000	-16.6	16.5	4.2
I	123 466 900	84 565 791	208 032 691	125 602 705	86 398 831	212 001 536	1.7	2.2	1.9
L	89 177	1 051 215	1 140 392	80 936	1 089 407	1 170 343	-9.2	3.6	2.6
NL (4)	8 798 500	9 581 400	18 379 900	12 622 000	14 262 000	26 884 000	n.c.	n.c.	n.c.
A (5)	16 302 434	56 198 473	72 500 907	16 482 555	53 498 539	69 981 094	-1.2	-4.6	-3.9
P	7 135 200	19 789 400	26 924 600	9 164 000	23 241 000	32 405 000	28.4	17.4	20.4
FIN	8 464 224	2 926 316	11 390 540	9 419 757	3 210 546	12 630 303	11.3	9.7	10.9
S (6)	14 667 899	3 626 683	18 294 582	15 643 000	4 409 000	20 052 000	6.6	21.6	9.6
UK	88 148 119	90 188 623	178 336 742	81 060 000	86 631 000	167 691 000	-8.0	-3.9	-6.0
IS	246 000	598 000	844 000	309 306	791 412	1 100 718	25.7	32.3	30.4
LI	994	126 516	127 510	3 163	120 089	123 252	n.c.	-5.1	n.c.
NO	9 861 800	4 985 458	14 847 258	11 252 483	5 168 217	16 420 700	14.1	3.7	10.6
CH	12 316 371	18 386 194	30 702 565	13 104 626	18 712 433	31 817 059	6.4	1.8	3.6

(1) Variations exclude the Netherlands. Denmark: 1996 data for 1995. Austria: 1997 data for 1998.

(2) Changes in methodology in 1996; variation refers to 1996-1998.

(3) 1998 data refer to 1997; variation refers to 1995-1997.

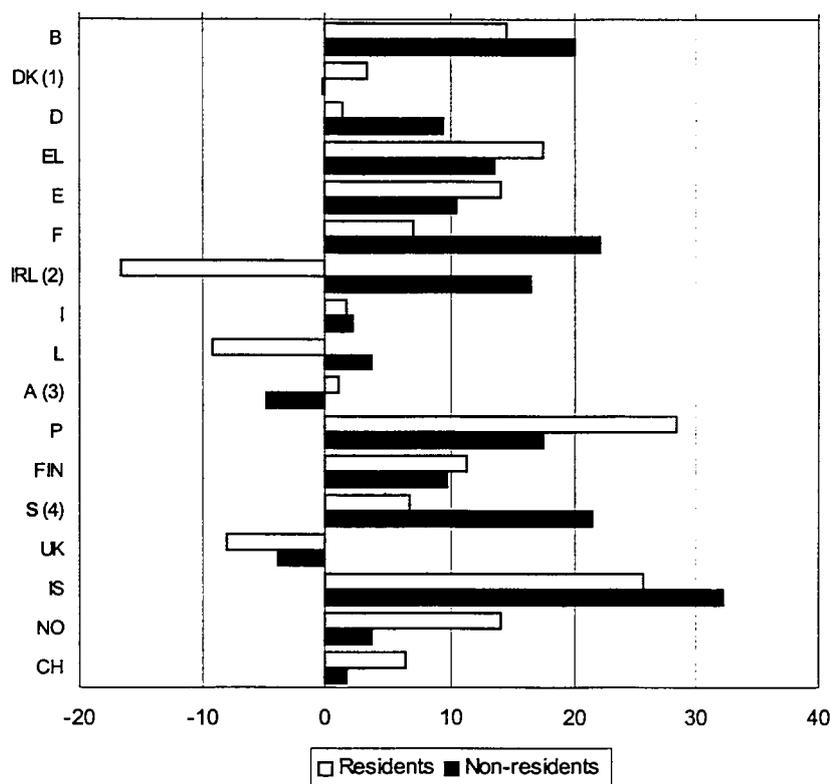
(4) Change in methodology 1997-1998.

(5) Change in methodology in 1998; variation refers to 1995-1997.

(6) 1995 data for resident visitors refer to 1996.

Source: Eurostat.

**Graph 2.3 - Nights spent in hotels and similar establishments in the EU and EFTA countries, variations (%), 1995-1998**



- (1) Changes in methodology in 1996; variation refers to 1996-1998.  
 (2) Variation refers to 1995-1997.  
 (3) Change in methodology in 1998; variation refers to 1995-1997.  
 (4) Regarding resident visitors, variation refers to 1996-1998.  
 Source: Eurostat.

On the other hand, in 1998 Spain recorded the highest percentage share within the EU in terms of inbound tourism (20%). It attained over 111 million nights spent by non-residents. The United Kingdom and Italy followed with over 86 million nights each.

Data for 1998 show a positive trend in tourism flows in the EU countries as a whole, compared to 1995. Figures indicate a 4.7% increase in the number of total nights spent in hotels and similar establishments. The global growth of tourism flows in the EU originated from the increase both of domestic tourism (+2.9%) and to a greater extent of inbound tourism (+6.8%) (see also graph 2.3).

In the euro-zone the increase moved at a faster pace amounting to 6.4%. The growth was mainly due to domestic tourism (8.7%) than to inbound tourism (4.5%). In the four EFTA countries, the growth in the number of nights spent in hotels and similar establishments was 6.3%, most of which due to the high increase occurred in domestic tourism flows (+10%).

The positive performance registered by the European region can be observed in most countries. In fact, data

show that, with only few exceptions, all the EU and EFTA countries recorded increases in the total number of nights spent by tourists in hotels and similar establishments. Countries reporting the highest growth were Iceland (30.4%), Portugal (+20.4%) and Belgium (+18.5%); Greece and France followed with an increase of more than 14% and 12% respectively. On the contrary, the United Kingdom showed a contraction of 6% between 1995 and 1998 and Austria a decrease of nearly 4% between 1995 and 1997.

In several countries the global positive trend in the nights spent in hotels was mainly due to the good increment of inbound tourism. France (+22.1%), Sweden (+21.6%) and Portugal (+17.4%) recorded the best performances. In particular, in the case of Luxembourg and Ireland the growth of inbound tourism (+3.6% and +16.5% respectively) covered the considerable drop occurred in domestic tourism (-9.2% and -16.6% respectively).

Table 2.2 shows in percentage the main four generating markets for each EU and EFTA country. From the figures, Germany appears the most important generating market within Europe,

representing 37% of the non-resident overnights in the EU and 41% in the euro-zone. It is the first generating market for seven EU countries and for all the EFTA countries. Moreover, it is the second generating market for other five EU countries. On the second position, UK generates 22% and 27% of the nights spent by non-residents respectively in the EU and the euro-zone. It is the first generating market for four countries and the second generating market for seven other countries.

With respect of the level of concentration, the first generating market represents for Ireland and Austria more than two third of the total number of nights spent by non-residents in hotels and similar establishments and for Italy and Switzerland nearly 50%. Considering the top four generating markets for each country, the share is over the 60% for all countries except for Germany, representing the most diversified country with 53% share. On the other hand, Ireland holds the highest share of the four top generating markets (89%).

The two maps below, which are based on 1997 data, show the number of nights spent in hotels and similar

establishments per 100 inhabitants at country (map A) and regional level (map B). Also, the corresponding share of residents and non-residents is shown at country level.

At national level, Greece, Spain, Ireland and Austria record the highest density of tourists with more than 400 nights spent in hotels and similar establishments per 100 inhabitants. In all four cases the number of nights spent by non-resident tourists exceeds the number of nights spent by residents. Belgium, Denmark and the Netherlands are the three countries with the lowest number of nights spent per 100 inhabitants, i. e. below 200.

### 2.1.2 Regional trends

At regional level, the regions with the highest concentration of tourist per 100 inhabitants are irregularly distributed. However, most of the Mediterranean regions are among them. The low number of inhabitants of certain regions result, in some cases, into a significant density of tourist affluence. In absolute values the regions of Great London, Ile de France and Islas Baleares, are the first of the ranking, with more than 40 million overnights stays in 1997.

**Table 2.2 - Generating markets: overnights spent by non-residents in hotels and similar establishments in 1998**

	First market		Second market		Third market		Fourth market		Fourth market
	Country	(%)	Country	(%)	Country	(%)	Country	(%)	(%)
EU-15	D	37	UK	22	F	8	NL	7	74
EUR-11	D	41	UK	27	F	7	NL	7	82
B	UK	26	NL	19	F	17	D	16	78
DK	S	34	N	21	D	16	UK	10	81
D	NL	17	UK	17	I	10	CH	9	53
EL	D	39	UK	16	I	7	A	6	68
E	D	34	UK	33	F	7	B	5	79
F	UK	29	D	18	I	16	B	10	73
IRL (1)	UK	66	D	10	F	8	NL	5	89
I	D	49	UK	12	F	9	A	8	78
L	B	31	D	17	NL	16	F	11	75
NL (1)	D	32	UK	28	F	11	B	7	78
A	D	69	NL	7	UK	5	CH	5	86
P	UK	31	D	23	E	11	NL	8	73
FIN	S	24	D	20	UK	15	N	7	66
S (2)	D	27	N	18	UK	14	DK	11	70
UK	D	20	F	16	IRL	15	E	10	61
IS	D	26	UK	15	S	10	DK	9	60
LI	D	45	CH	27	A	5	UK	4	81
NO	D	23	DK	20	S	16	UK	13	72
CH	D	49	UK	12	F	9	I	7	77

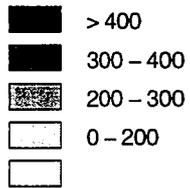
(1) 1997 data.

(2) 1996 data.

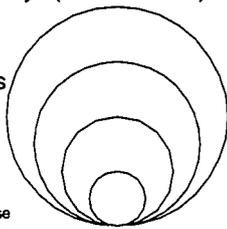
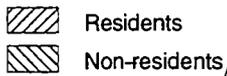
Source: Eurostat.

# Total nights spent in hotels and similar establishments 1997

Number of nights spent  
per 100 inhabitants

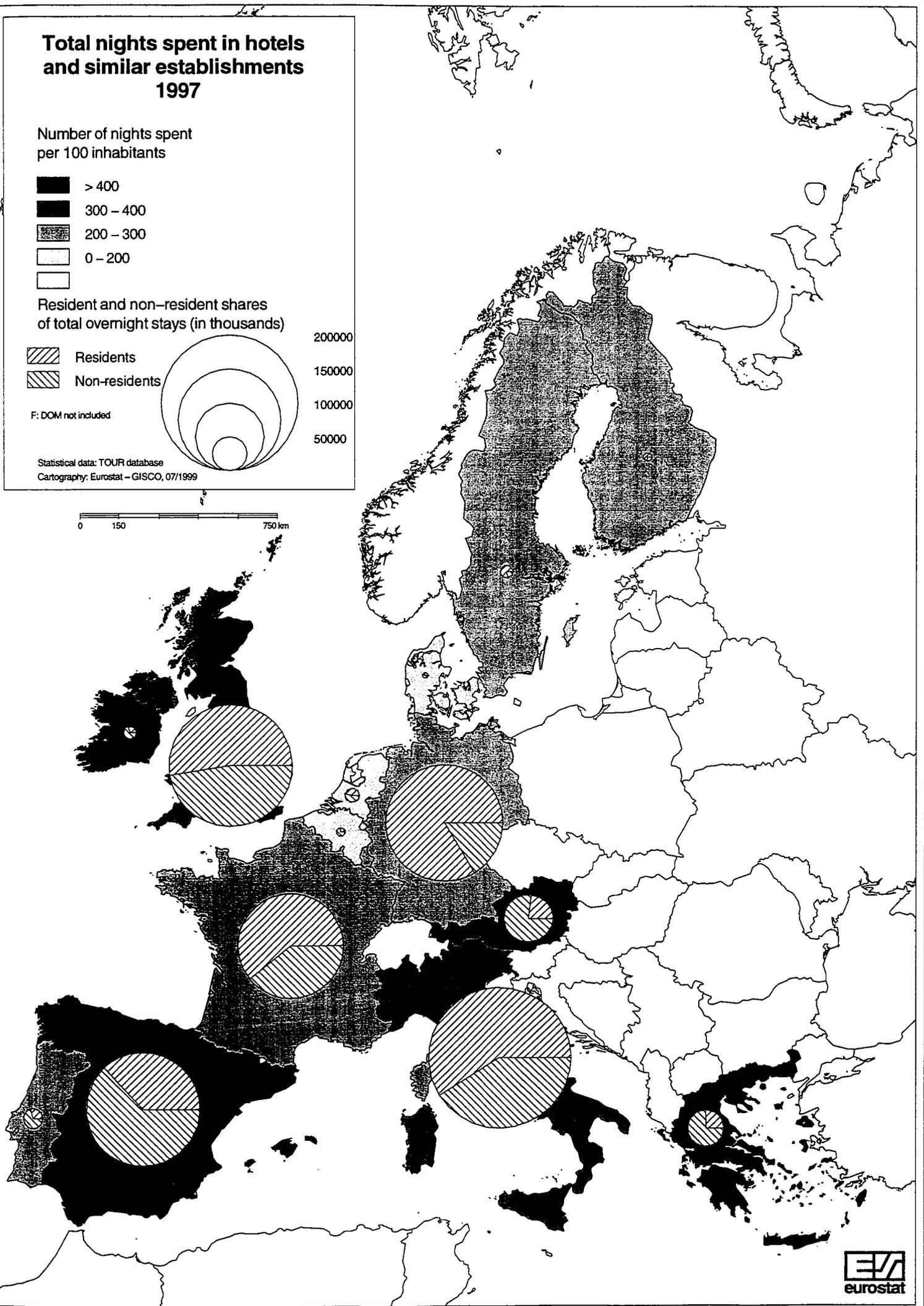


Resident and non-resident shares  
of total overnight stays (in thousands)



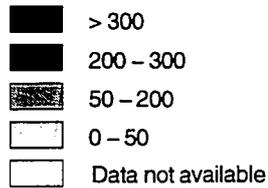
F: DOM not included

Statistical data: TOUR database  
Cartography: Eurostat - GISCO, 07/1999

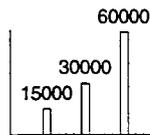


# Total nights spent in hotels and similar establishments 1997, NUTS 2

Number of nights spent  
per 100 inhabitants

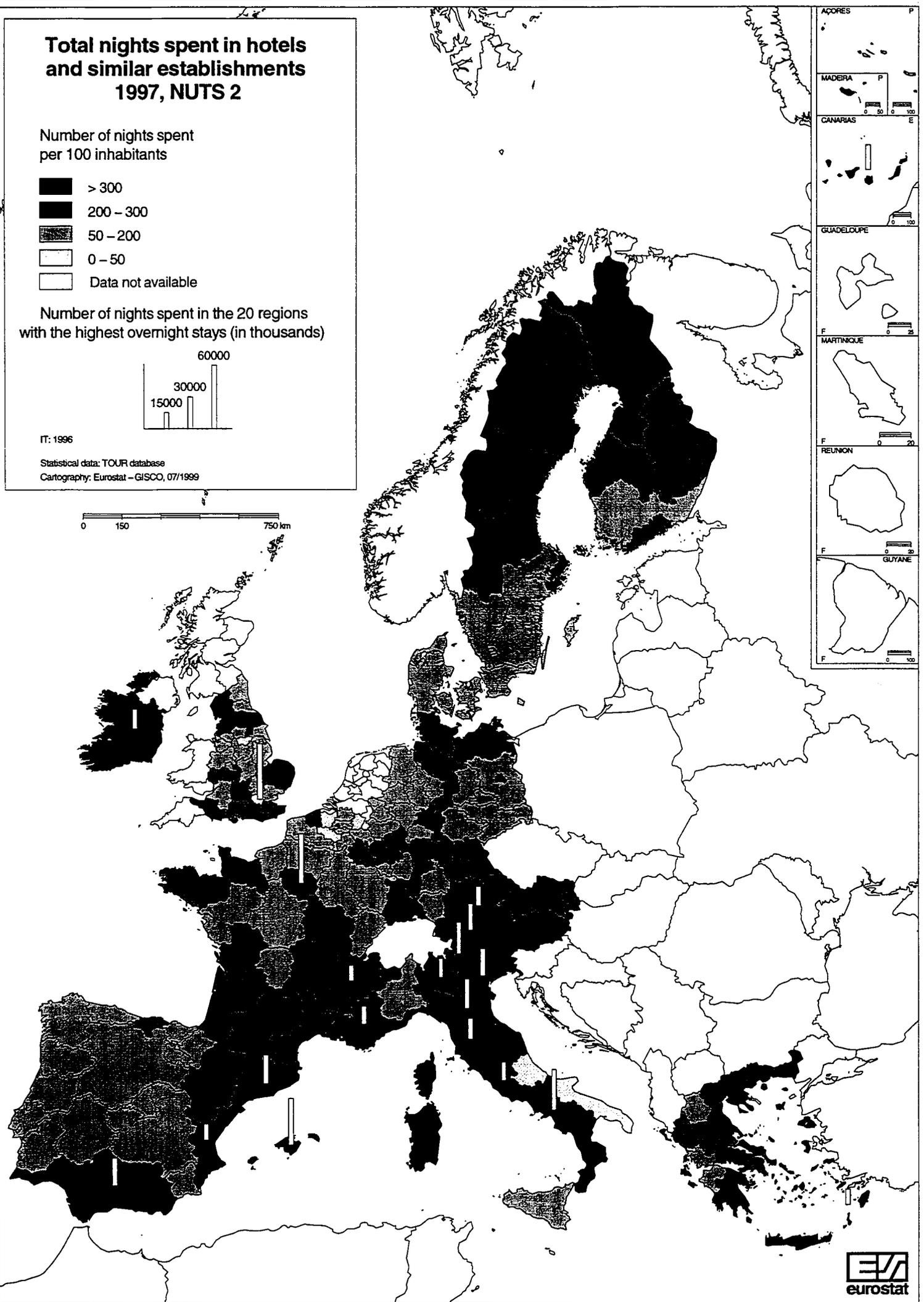


Number of nights spent in the 20 regions  
with the highest overnight stays (in thousands)



IT: 1996

Statistical data: TOUR database  
Cartography: Eurostat - GISCO, 07/1999



**2.1.3 Occupancy in other collective accommodation**

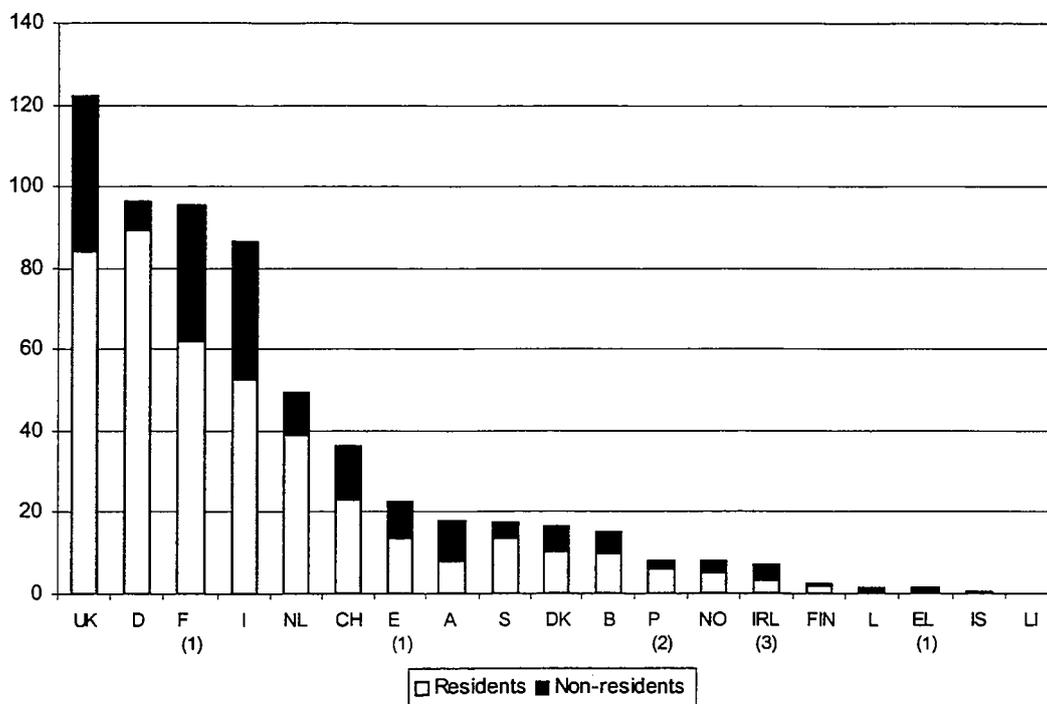
According to the Commission Decision on implementing measures of the Council Directive on tourism statistics<sup>2</sup> the category "other collective accommodation" covers various types of tourist accommodation facilities: holiday dwellings, tourist camp-sites, youth hostels, tourist dormitories, group accommodation for employees and workers' hotels, halls of residence for students and school dormitories and other similar facilities.

In 1998 resident and non-resident tourists spent almost 560 million nights in other collective accommodation establishments in the European Union and more than 402 million in the euro-zone. Adding the four EFTA countries, the total number of nights spent in this type of accommodation reached more than 604 million. The United Kingdom, with more than 122 million nights, recorded the highest number of nights. It represented by its own around 21.8% of the EU total, of which 68% was composed

by domestic tourism. Germany ranked the second place with over 96 million nights (17.2% of the total) and France followed with over 95 million nights (17% of the total). The top four countries altogether (including Italy) represented 71% of all the tourism flows in other collective accommodation.

Domestic tourism represented more than 70% of the nights spent in other collective accommodation in the EU and euro-zone and 63% in the EFTA countries. However, the relative weight of these two components varied considerably from one country to another. As usual, small countries like Luxembourg and Liechtenstein, showed the highest share of nights spent by non-residents, reaching almost 87% and over 79% of the total respectively. Greece followed with over 60% of inbound tourism, and Ireland with almost 58%. On the other hand, domestic tourism largely prevailed in Germany representing over 92% of the total number of nights spent in other collective accommodation, in Finland with almost 82% and in Sweden with almost 80%.

**Graph 2.4 - Nights spent in other collective accommodation in the EU and EFTA countries, residents and non-residents, Mio, 1998**



(1) Only tourist campsites.  
 (2) Excluding holiday dwellings.  
 (3) 1997 data.  
 Source: Eurostat.

<sup>2</sup> OJ No L9, 15.1.1999, p.23

**Table 2.3 - Nights spent in other collective accommodation in the EU and EFTA countries, residents and non-residents, 1995-1998**

	1995			1998			Variations 1995-1998 (%)		
	Residents	Non-residents	Total	Residents	Non-residents	Total	Residents	Non-residents	Total
EU-15 (1)	411 441 172	162 811 807	574 252 979	394 118 191	165 341 347	559 459 538	-4.3	-0.2	-3.2
EUR-11 (1)	293 658 123	106 406 737	400 064 860	285 380 862	116 992 699	402 373 561	-3.0	7.3	-0.3
B	11 079 069	5 982 181	17 061 250	9 686 934	5 355 659	15 042 593	-12.6	-10.5	-11.8
DK (2)	11 030 229	4 905 400	15 935 629	10 543 170	5 825 265	16 368 435	-4.4	18.8	2.7
D	99 777 589	8 300 000	108 077 589	89 095 000	7 357 000	96 452 000	-10.7	-11.4	-10.8
EL (3)	496 180	758 229	1 254 409	469 159	717 383	1 186 542	-5.4	-5.4	-5.4
E (3)	14 257 875	6 604 922	20 862 797	13 440 251	9 188 525	22 628 776	-5.7	39.1	8.5
F (3)	64 777 256	33 209 129	97 986 385	62 153 371	33 013 338	95 166 709	-4.1	-0.6	-2.9
IRL (4)	3 517 000	2 554 000	6 071 000	3 076 000	4 200 000	7 276 000	-12.5	64.4	19.8
I	50 027 321	28 434 780	78 462 101	52 410 841	34 165 571	86 576 412	4.8	20.2	10.3
L	138 403	1 275 724	1 414 127	183 595	1 206 449	1 390 044	32.7	-5.4	-1.7
NL	33 381 000	10 155 000	43 536 000	39 127 000	10 311 000	49 438 000	17.2	1.5	13.6
A (5)	8 149 783	7 641 346	15 791 129	7 938 863	9 696 508	17 635 371	-9.3	-9.4	-9.4
P (6)	6 385 745	1 883 487	8 269 232	6 163 000	2 032 000	8 195 000	-3.5	7.9	-0.9
FIN	2 167 082	366 168	2 533 250	2 106 007	466 649	2 572 656	-2.8	27.4	1.6
S	14 656 640	4 166 936	18 823 576	13 825 000	3 620 000	17 445 000	-5.7	-13.1	-7.3
UK	91 600 000	46 574 505	138 174 505	83 900 000	38 186 000	122 086 000	-8.4	-18.0	-11.6
IS	207 000	213 000	420 000	196 923	198 135	395 058	-4.9	-7.0	-5.9
LI	8 305	40 123	48 428	10 595	40 394	50 989	27.6	0.7	5.3
NO (7)	2 295 584	2 074 333	4 369 917	5 392 783	2 700 488	8 093 271	n.c.	n.c.	n.c.
CH	24 796 261	15 597 322	40 393 583	22 825 044	13 514 864	36 339 908	-7.9	-13.4	-10.0

(1) Variations express % changes 98/95 except for Austria (see note 5)

(2) 1995 data refer to 1996 for holiday dwellings.

(3) Only tourist campsites.

(4) 1997 data for 1998.

(5) Change in methodology in 1998. Variations express % changes 97/95.

(6) Excluding holiday dwellings.

(7) 1995 data only include tourist campsites. In 1998 there is a change in methodology for tourist campsites.

Source: Eurostat.

With regards to domestic tourism flows, Germany reported the highest number of nights spent by residents. They amounted to over 89 million, or 22.6% of the total nights spent by residents in this type of tourist facility in the EU. With almost 84 million nights, the United Kingdom recorded the second best performance. These two countries together represented about 44% of the total number of nights spent by resident tourists in other collective accommodation.

Considering inbound tourism flows, the United Kingdom registered the largest number of nights spent by non-residents in other collective accommodation. They were over 38 million, that is 23% of the total within the EU.

Italy recorded the second place reaching 34 million of nights and France followed with 33 million nights.

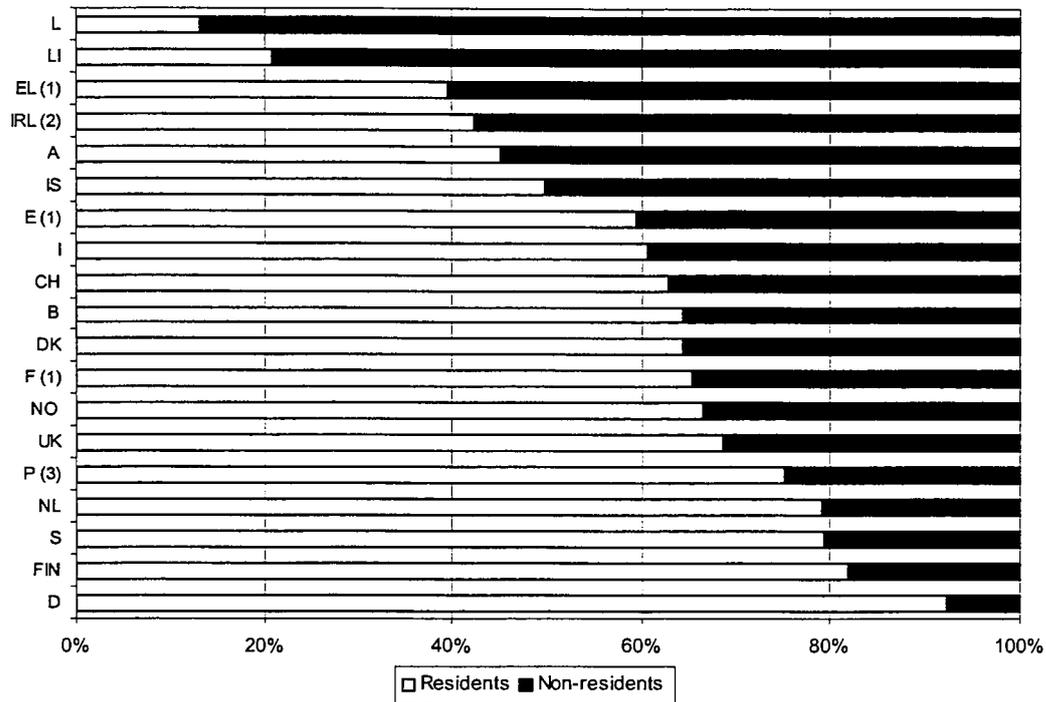
Between 1995 and 1998 the EU recorded a moderate decrease in the number of nights spent in other collective accommodation (-3.2%), while the euro-zone experienced a substantial stability (-0.3%). Adding the

EFTA countries, tourism flows in other collective accommodation showed a decrease of -3.0%.

The EU overall trend was the result of a substantial stability recorded by inbound tourism flows (-0.2%) combined with a negative variation in domestic tourism flows (-4.3). The stability of the euro-zone trend was due to a noticeable positive performance registered in inbound flows (+7.3) combined with a moderate decrease in domestic flows (-3.0).

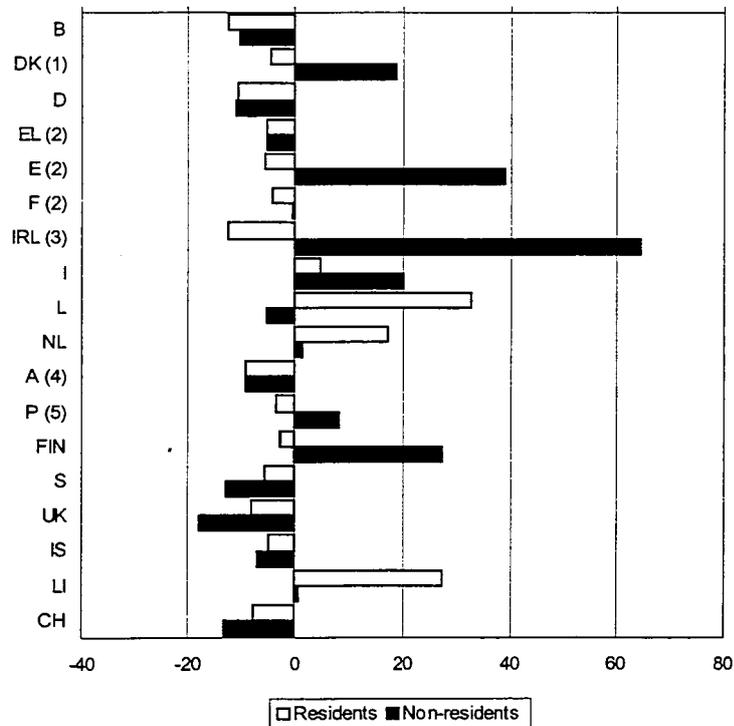
The trend can be generalised to most of the European countries. In comparison with 1995, in 1998 Belgium, the United Kingdom and Germany reported the strongest decreases in percentage terms (-11.8%, -11.6% and -10.8% respectively). On the other hand, Ireland experienced the most significant growth (+19.8%) followed by the Netherlands and Italy (+13.6% and +10.3% respectively).

**Graph 2.5 - Domestic and inbound tourism in other collective accommodation in the EU and EFTA countries, share (%), 1998**



(1) Only tourist campsites.  
 (2) 1997 data for 1998.  
 (3) Excluding holiday dwellings.  
 Source: Eurostat.

**Graph 2.6 - Nights spent in other collective accommodation in the EU and EFTA countries, variations (%), 1995-1998**



(1) 1995 data refer to 1996 for holiday dwellings.  
 (2) Only tourist campsites.  
 (3) 1997 data for 1998.  
 (4) Change in methodology in 1998. Variation refers to 1995-1997.  
 (5) Excluding holiday dwellings.  
 Source: Eurostat.

## 2.2 Central European Countries<sup>3</sup>

### 2.2.1 Occupancy in hotels and similar establishments

In 1998 resident and non-resident tourists spent over 103 million nights in hotels and similar establishments in the Central European Countries (CECs). About 50% of these tourism flows were due to inbound tourism (see table 2.4).

The Czech Republic, with more than 20 million nights, was the most dynamic country in terms of number of nights spent in hotels and similar establishments. It captured alone more than 20% of the hotels' tourism flows of the 14 countries considered. Of these, almost half was due to inbound tourism. Romania ranked in second place with over 16 million nights (over 16% of the total). Poland followed with almost 16 million nights (over 15% of the total).

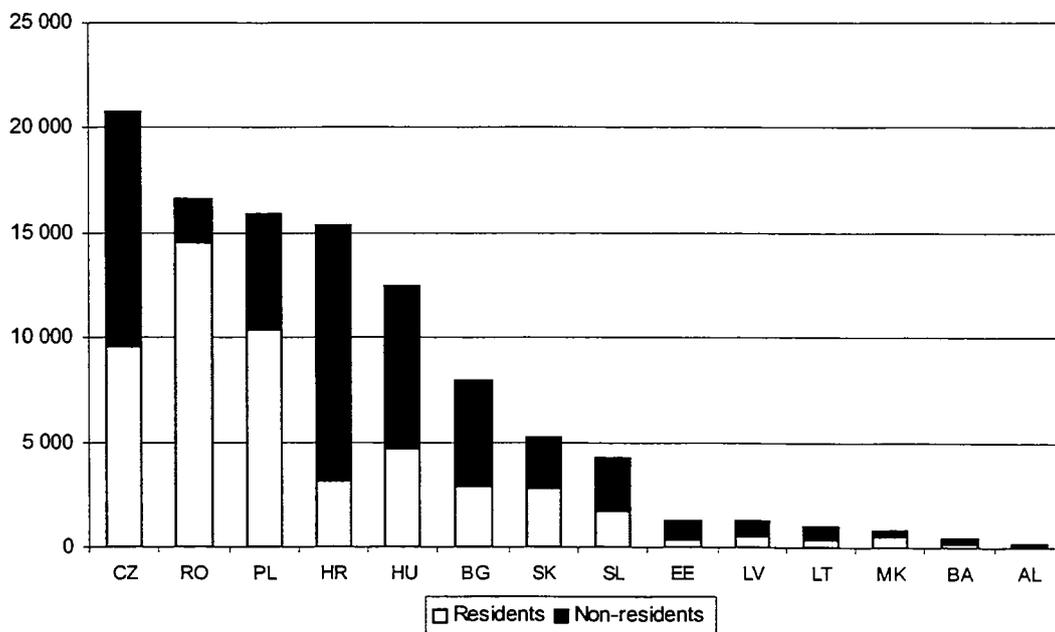
In the majority of the CECs analysed, inbound tourism prevailed over domestic one. Croatia showed the highest share of inbound tourism on total tourism

flows. Almost four out of five nights spent by tourists in hotels and similar establishments were due to non-resident overnight visitors.

Inbound tourism represented around 70% of the total tourism flows in Estonia, while Lithuania and Bulgaria followed with a percentage share of over 60%. In absolute values, Croatia and Czech Republic were the countries with the highest number of nights spent by non-residents in hotels and similar establishments in 1998. They were over 12.1 million and 11.1 million respectively, representing almost 46% of the hotels inbound tourism market of the ten CECs considered. Hungary recorded the third best performance with more than 7 million nights due to non-resident tourists. In 1998, Romania, with over 14.5 million nights, showed the highest number of nights spent by residents. It registered approximately 28% of the total domestic tourism flows registered in the 14 countries. Poland and the Czech Republic followed with over 10.4 and almost 9.6 million nights respectively.

Compared to 1995, in 1998 figures indicate an average increase of almost 15.8% in the number of nights spent in hotels and similar establishments.

**Graph 2.7 - Nights spent in hotels and similar establishments in the CECs, residents and non-residents, ('000), 1998**



Source: Eurostat.

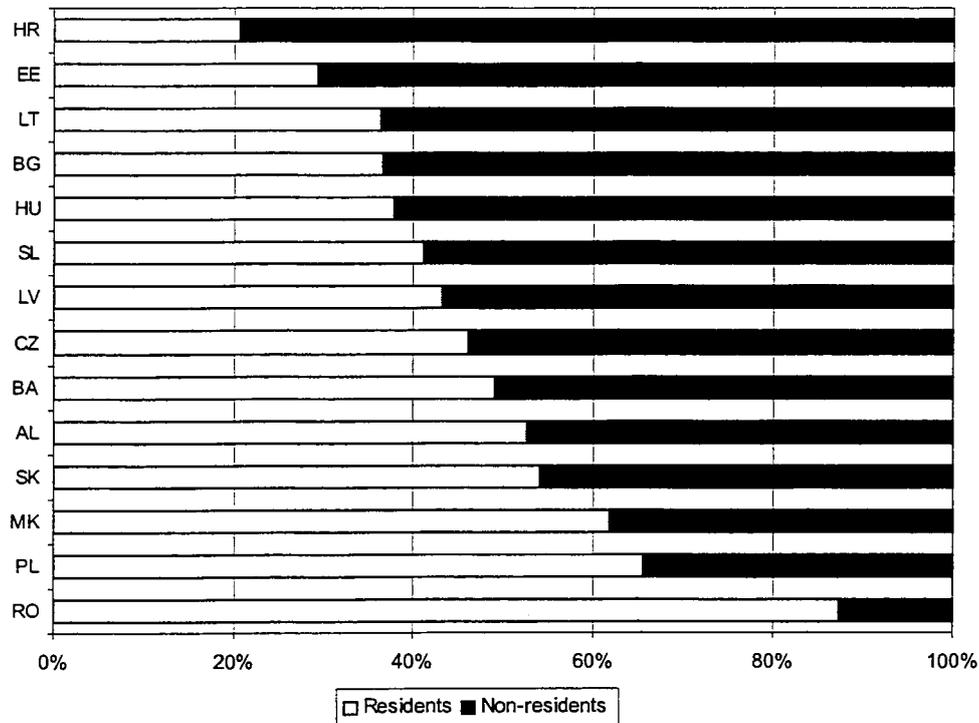
<sup>3</sup> The 14 Central European Countries analysed in this publication are: Albania (AL), Bosnia and Herzegovina (BA), Bulgaria (BG), Czech Republic (CZ), Estonia (EE), former Yugoslav Republic of Macedonia (FYROM), Hungary (HU), Latvia (LV), Lithuania (LT), Poland (PL), Romania (RO), Slovakia (SK), Slovenia (SL), Croatia (HR).

**Table 2.4 - Nights spent in hotels and similar establishments in the CECs, residents and non-residents, 1995-1998**

	1995			1998			Variations 1995-1998 (%)		
	Residents	Non-residents	Total	Residents	Non-residents	Total	Residents	Non-residents	Total
<b>Total (1)</b>	<b>41 688 988</b>	<b>33 928 304</b>	<b>75 617 292</b>	<b>51 968 206</b>	<b>51 422 757</b>	<b>103 390 963</b>	<b>-0.3</b>	<b>35.5</b>	<b>15.8</b>
AL	123 000	69 000	192 000	81 000	73 000	154 000	-34.1	5.8	-19.8
BA	68 540	56 418	124 958	221 806	230 957	452 763	223.6	309.4	262.3
BG	3 735 000	5 299 000	9 034 000	2 921 000	5 043 000	7 964 000	-21.8	-4.8	-11.8
HR	3 125 140	4 574 802	7 699 942	3 147 000	12 164 000	15 311 000	0.7	165.9	98.8
CZ	6 952 469	8 385 611	15 338 080	9 591 000	11 180 000	20 771 000	38.0	33.3	35.4
EE	325 000	608 000	933 000	379 000	907 000	1 286 000	16.6	49.2	37.8
MK	464 404	243 489	707 893	505 000	310 000	815 000	8.7	27.3	15.1
HU	3 972 000	6 894 000	10 866 000	4 714 000	7 714 000	12 428 000	18.7	11.9	14.4
LV	599 960	661 505	1 261 465	551 200	725 000	1 276 200	-8.1	9.6	1.2
LT	331 146	417 510	748 656	364 000	639 000	1 003 000	9.9	53.1	34.0
PL	:	:	:	10 413 200	5 448 900	15 862 100	:	:	:
RO	17 746 211	2 320 332	20 066 543	14 522 000	2 109 000	16 631 000	-18.2	-9.1	-17.1
SK	2 179 741	2 339 704	4 519 445	2 830 000	2 401 000	5 231 000	29.8	2.6	15.7
SL	2 066 377	2 058 933	4 125 310	1 728 000	2 477 900	4 205 900	-16.4	20.3	2.0

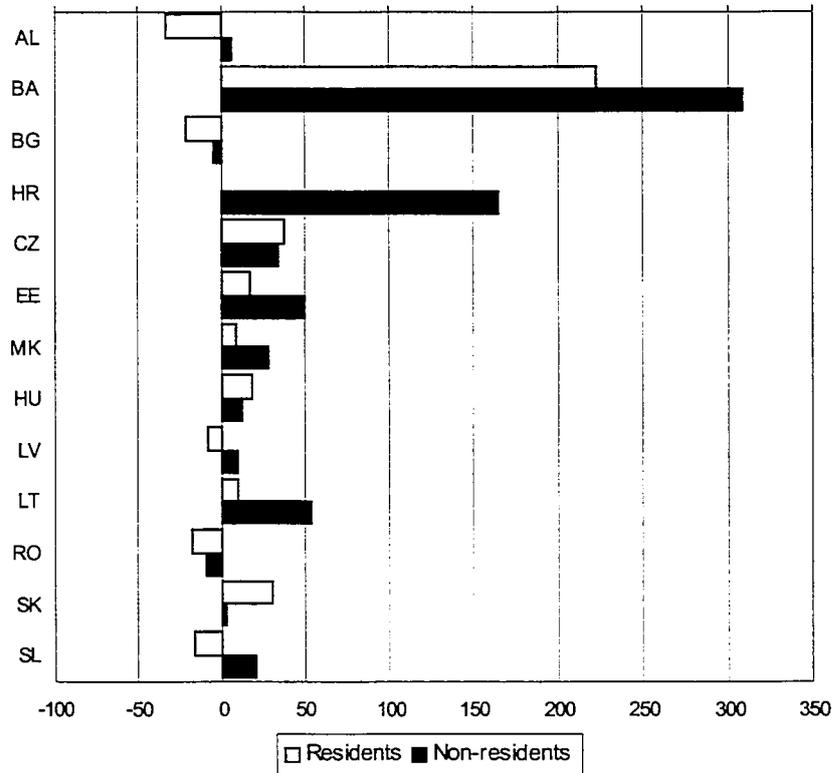
(1) Excluding Poland in 1995 and in variations.

Source: Eurostat.

**Graph 2.8 - Domestic and inbound tourism in hotels and similar establishments in the CECs, share (%), 1998**


Source: Eurostat.

**Graph 2.9 - Nights spent in hotels and similar establishments in the CECs, variations (%), 1995-1998**



Source: Eurostat.

The global growth of tourism flows was due to the extremely good performance registered by inbound tourism flows (+35.5%) combined with the substantial stability registered in domestic tourism flows (-0.3%).

With few exceptions, the positive performance described above can be extended to most of the countries. In fact, figures show that ten countries recorded increases in the total number of nights spent by tourists in hotels and similar establishments. The highest growth was registered by Bosnia and Herzegovina. Croatia ranked the second place and Estonia followed in third place. On the other hand, Albania reported a drop of about 20%. Romania, also, showed a noticeable contraction of over 17%.

Inbound tourism flows showed positive trends in eight Central European countries. Bosnia and Herzegovina and Croatia recorded the best performances.

Domestic tourism flows showed the highest increases in Bosnia and Herzegovina, where the number of nights spent by residents grew by more than 223%. On the other hand Albania and Bulgaria reported the highest decreases.

### 2.2.2 Occupancy in other collective accommodation

In 1998 resident and non-resident tourists spent more than 96 million nights in other collective accommodation establishments (tourist camp-sites, holiday dwellings and other collective accommodation) in the Central European Countries<sup>4</sup>. Nearly 63% of them was due to domestic tourism.

Poland, with more than 43 million nights, was the biggest country in terms of number of nights spent in other collective accommodation establishments, of which more than 94% was composed by domestic tourism. It represented by its own over 44% of the total domestic tourism flows in the CECs. The Czech Republic ranked the second place recording over 24 million nights (almost 26% of the total) and Croatia followed registering more than 9 million nights (10.4%).

In ten countries domestic tourism strongly prevailed over inbound tourism. Romania showed the highest share of nights spent by residents, exceeding 96% of the total tourism flows in other collective accommodation establishments.

<sup>4</sup> Excluding Albania and Estonia.

**Table 2.5 - Nights spent in other collective accommodation in the CECs, residents and non-residents, 1995-1998**

	1995			1998			Variations 1995-1998 (%)		
	Residents	Non-residents	Total	Residents	Non-residents	Total	Residents	Non-residents	Total
Total (1)	:	:	:	75 604 909	20 470 368	96 075 277	:	:	:
AL	:	:	:	:	:	:	:	:	:
BA	:	:	:	2 709	368	3 077	:	:	:
BG	814 000	139 000	953 000	517 000	154 000	671 000	-36.5	10.8	-29.6
HR	965 090	3 379 890	4 344 980	1 327 000	8 630 000	9 957 000	37.5	155.3	129.2
CZ	6 881 024	1 889 365	8 770 389	19 584 000	5 037 000	24 621 000	184.6	166.6	180.7
EE	:	:	:	:	:	:	:	:	:
MK	584 978	12 397	597 375	581 000	24 000	605 000	-0.7	93.6	1.3
HU	1 552 000	2 440 000	3 992 000	2 064 000	2 424 000	4 488 000	33.0	-0.7	12.4
LV	135 292	6 282	141 574	156 500	7 900	164 400	15.7	25.8	16.1
LT	2 913 468	344 484	3 257 952	2 495 000	395 000	2 890 000	-14.4	14.7	-11.3
PL	35 147 238	2 745 800	37 893 038	40 747 500	2 388 100	43 135 600	15.9	-13.0	13.8
RO	3 984 253	60 374	4 044 627	2 455 000	98 000	2 553 000	-38.4	62.3	-36.9
SK	1 198 605	684 363	1 882 968	4 242 000	856 000	5 098 000	253.9	25.1	170.7
SL	1 293 373	262 308	1 555 681	1 433 200	456 000	1 889 200	10.8	73.8	21.4

(1) Excluding Albania and Estonia.

Source: Eurostat.

The Former Yugoslav Republic of Macedonia followed reporting a share of 96%. Only in Croatia inbound tourism clearly surpassed domestic tourism (86.7% of the total). Hungary showed a balanced situation, having slightly more than half of the tourism flows represented by inbound tourism.

Considering domestic tourism flows, in 1998, Poland registered the highest number of nights spent by residents. They were over 40 million, representing more than 53% of the total nights spent by residents in this type of tourist facility in the 12 countries considered. The Czech Republic, recorded the second best performance with about 20 million nights.

Croatia had the largest value for inbound tourism. It reached more than 8 million nights spent by non-residents representing more than 42% of the tourism marked under consideration. Czech Republic and Hungary followed reporting 5 and 2.4 million nights respectively. The three above mentioned countries captured almost 80% of the total inbound tourism market of other collective accommodation of the 12 countries as a whole.

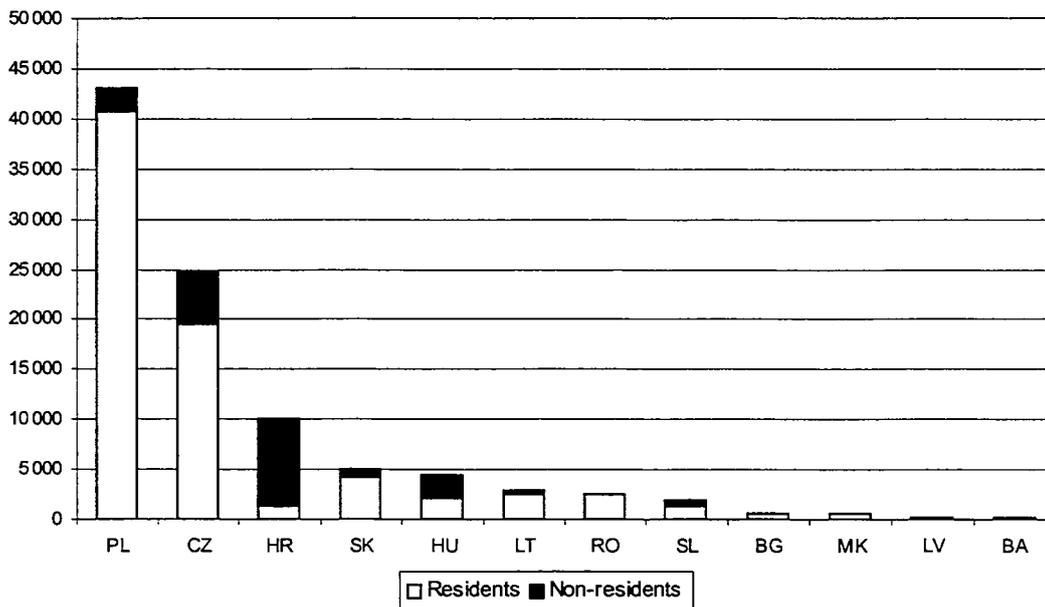
Compared with 1995, 1998 figures indicated a sharp average increase (+42.5%) in the number of nights spent in other collective accommodation<sup>5</sup>. The Czech Republic reported the most remarkable positive trend in percentage terms. Slovakia and Croatia followed. On the other hand, Romania, Bulgaria and Lithuania registered the sharpest contractions.

Between 1995 and 1998 the average increase in the number of nights spent by residents reached a noteworthy 36.3%. Slovakia showed the strongest positive variation. The Czech Republic and Croatia followed.

Inbound tourism in the CECs registered a remarkable average growth of about 71.1%. The same positive trend characterised most of the countries in the region. The Czech Republic reported the biggest increase in inbound tourism flows, followed by Croatia and the Former Yugoslav Republic of Macedonia. Poland registered a negative variation (-13%), while Hungary showed a substantially stable trend (-0.7%).

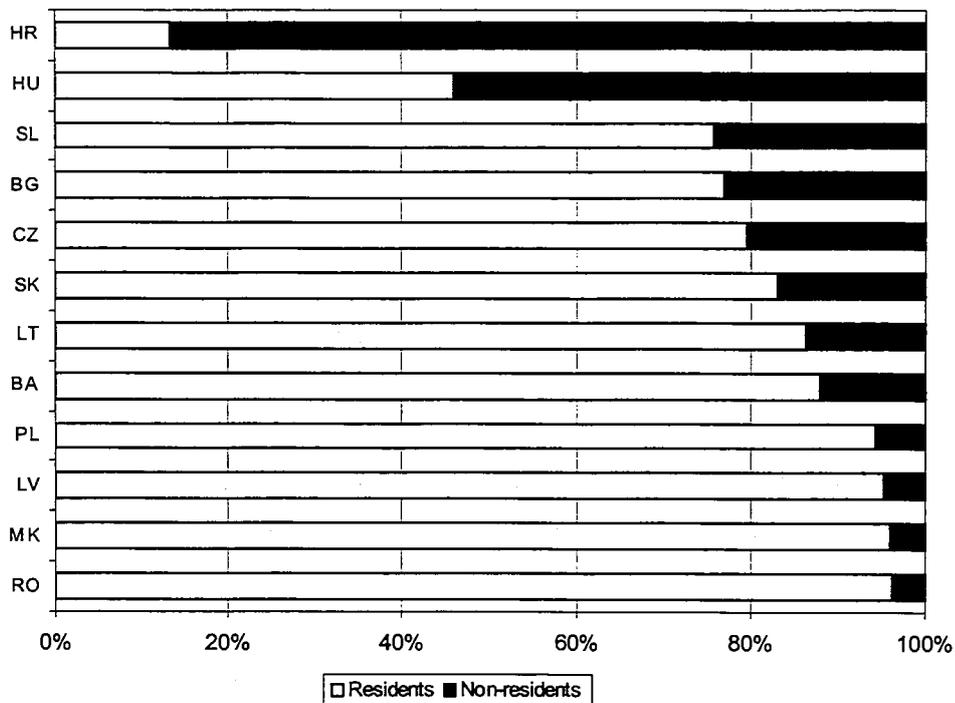
<sup>5</sup> The comparison refers only to those countries for which data were available both for 1995 and 1998, thus excluding Albania, Bosnia and Herzegovina and Estonia.

**Graph 2.10 - Nights spent in other collective accommodation in the CECs, residents and non-residents ('000), 1998**



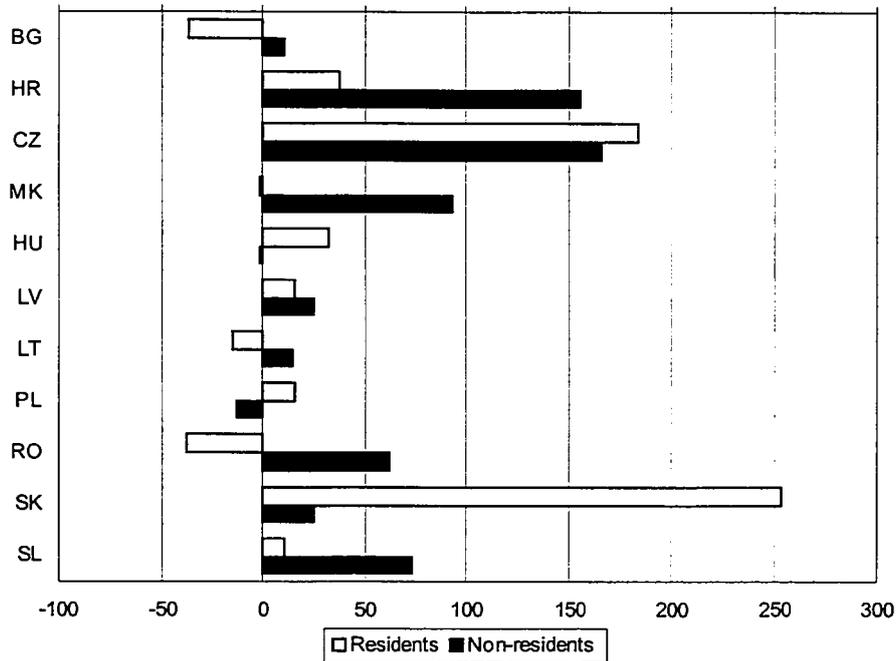
Source: Eurostat.

**Graph 2.11 - Domestic and inbound tourism in other collective accommodation in the CECs, share (%), 1998**



Source: Eurostat.

**Graph 2.12 - Nights spent in other collective accommodation in the CECs, variations (%), 1995-1998**



Source: Eurostat.

## 2.3 Mediterranean Countries<sup>5</sup>

### 2.3.1 Arrivals at borders

In 1998 tourism flows to the Mediterranean partner countries amounted to nearly 29.4 million arrivals at the borders. Of these, 48% was due to tourism flows originating from the European Union.

Turkey was the most important tourist market for inbound tourism, with over 8.6 million tourists, receiving 29% of global tourist flows arriving in the Mediterranean countries. Tunisia with 5.2 million visitors (17.8% of the total) and Egypt with 3.4 million visitors (11.8% of the total) followed.

The composition of inbound tourism flows by area of origin (European Union or other countries) varied considerably from country to country. For Malta and Cyprus the share of foreign tourists coming from the European Union was over three quarters the total number of inbound tourists (83.4% and 75.3% respectively). For Turkey, Tunisia and Morocco

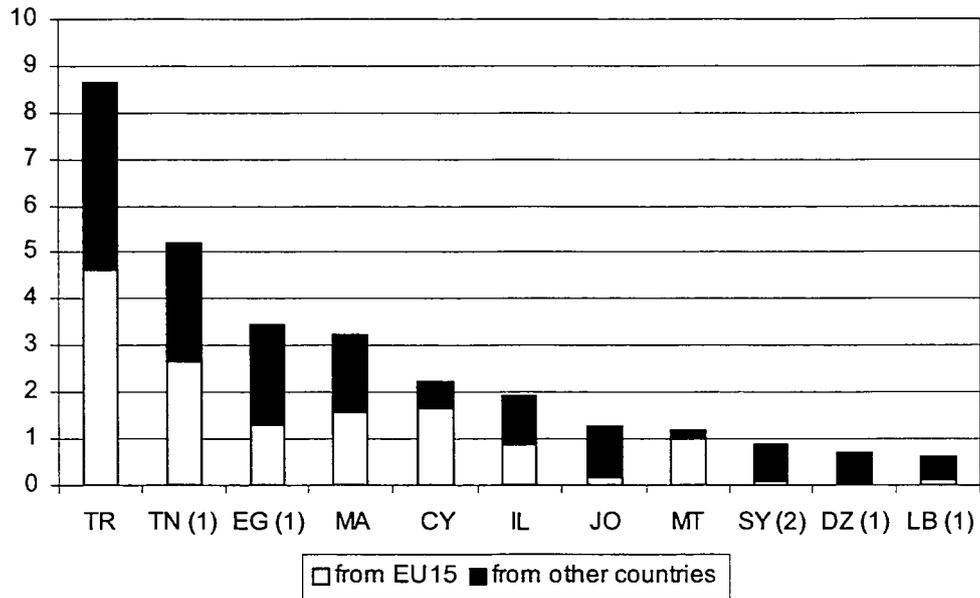
tourism from the European Union accounted for roughly half of the total (54%, 51% and 49% respectively). On the other hand, in the remaining countries the importance of tourism flows originating from the European Union was less important, with percentages ranging between 38.2% in the case of Egypt and 12% in the case of Syria.

In absolute values, in 1998 Turkey was the most important destination among the Mediterranean countries for EU tourists. They amounted to 4.6 million representing 33% of the total EU tourism flows to the area. Tunisia with 2.6 million EU visitors (18.6% of the total) and Cyprus with 1.6 million EU tourists (11.8% of the total) ranked second and third place respectively.

Data for 1998 show a significant increase in the number of international arrivals in the Mediterranean countries, with an average growth of 16% with respect to 1995 (25 million arrivals). The growth of inbound tourism resulted from the increase of both EU and non EU visitors (+18% and +15% respectively). Lebanon and Algeria registered the most significant increases in relative terms (+40.3% and +30.6%). On the other hand, Malta and Cyprus experienced moderate growths (+5.9% and +5.8% respectively).

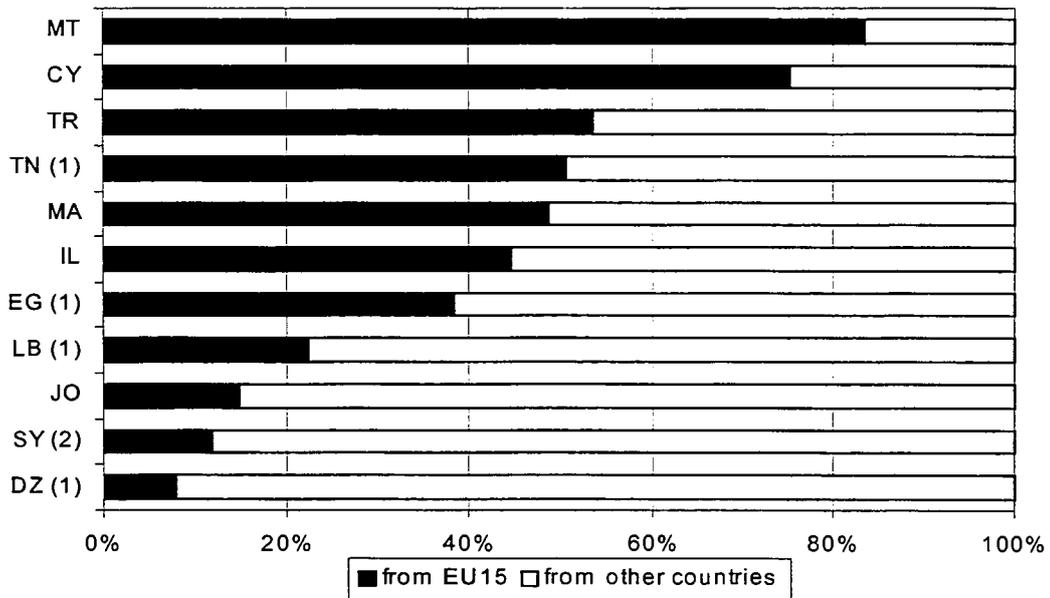
<sup>5</sup> The data for the sections about the Mediterranean countries are made available to Eurostat by the National Statistical Institutes and Ministries of Tourism within the framework of the Euro-Mediterranean co-operation programme on tourism statistics (MEDTOUR). The Mediterranean countries involved in the programme are: Algeria (DZ), Morocco (MA), Tunisia (TN), Egypt (EG), Jordan (JO), Lebanon (LB), the Palestinian Territories (PAL), Syria (SY), Israel (IL), Cyprus (CY), Malta (MT) and Turkey (TR).

Graph 2.13 - Arrivals at borders in Mediterranean countries, Mio, 1998



(1) Visitors  
 (2) 1997 data.  
 Source: Eurostat.

Graph 2.14 - Border arrivals from EU and non-EU countries to the Mediterranean countries, share (%), 1998



(1) arrivals of visitors  
 (2) 1997 data  
 Source: Eurostat.

**Table 2.6 - International tourist arrivals to the Mediterranean countries  
from EU and non-EU countries, 1995-1998**

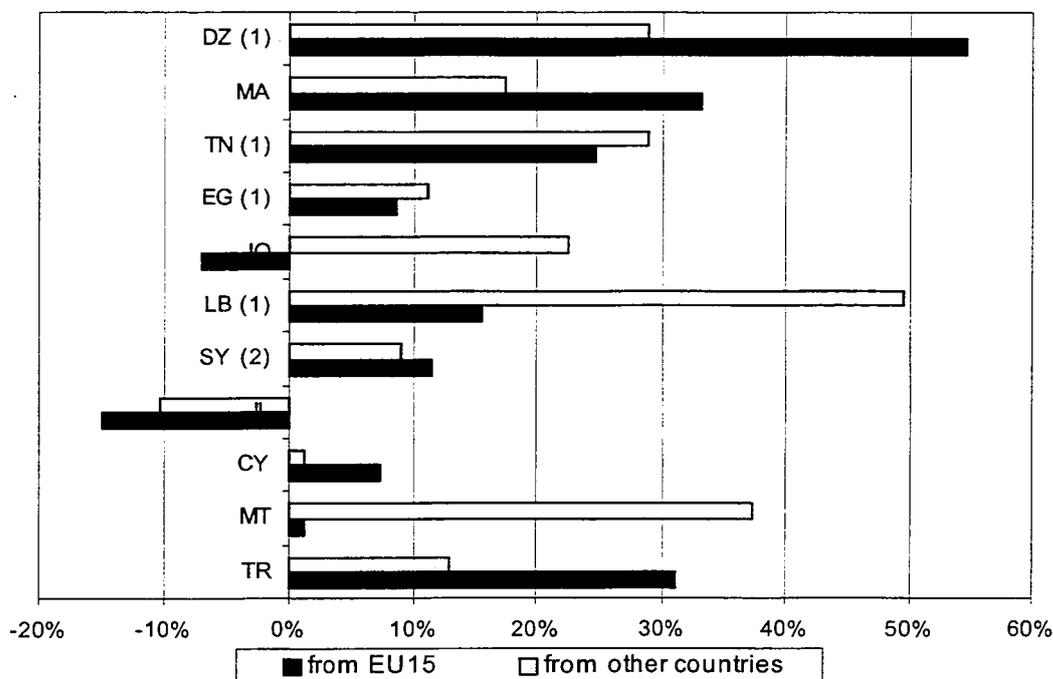
In thousands	1995			1998			Variations 1995-1998 (%)		
	EU-15	Non EU-15	Total	EU-15	Non EU-15	Total	EU-15	Non EU-15	Total
Total MED (1)	12 059	13 169	25 228	14 189	15 167	29 355	17.7	15.2	16.4
DZ (2)	35	485	520	53	625	678	54.7	28.9	30.6
MA	1 186	1 416	2 602	1 580	1 663	3 243	33.2	17.4	24.6
TN (2)	2 127	1 993	4 120	2 649	2 569	5 218	24.5	28.9	26.7
EG (2)	1 214	1 920	3 133	1 320	2 134	3 454	8.8	11.2	10.2
JO	201	873	1 074	187	1 069	1 256	-7.0	22.5	17.0
LB (2)	122	328	450	141	490	631	15.6	49.5	40.3
SY (3)	96	719	815	107	784	891	11.5	9.1	9.4
IL	1 020	1 196	2 216	868	1 074	1 942	-14.9	-10.2	-12.4
PAL	:	:	:	:	:	:	:	:	:
CY	1 559	541	2 100	1 675	548	2 223	7.4	1.3	5.8
MT	973	143	1 116	986	196	1 182	1.3	37.4	5.9
TR	3 526	3 557	7 083	4 623	4 015	8 638	31.1	12.9	22.0

(1) Excluding Palestine.

(2) arrivals of visitors

(3) 1997 data.

Source: Eurostat.

**Graph 2.15 - EU and non-EU tourism flows in the Mediterranean countries,  
variations (%), 1995-1998**


(1) arrivals of visitors

(2) Comparison refers to the period 1995-1997.

Source: Eurostat.

In five countries the variation of arrivals from non-EU countries exceeded the variation of arrivals from the

EU, which in two cases (Israel and Jordan) was negative. Algeria, Morocco and Turkey showed the best

performance as far as EU inbound flows are concerned, while Malta and Lebanon were the best performing countries for non EU tourism flows.

### 2.3.2 Occupancy in hotels and similar establishments (non-residents)

In 1998 non-resident tourists spent more than 129 million nights in hotels and similar establishments in the Mediterranean countries.

With more than 30 million nights Turkey was the biggest country in terms of number of nights spent by non-residents in hotels and similar establishments, representing by its own around 23% of the tourism market in the Mediterranean countries. Tunisia ranked in second place with almost 29 million nights (22%). Egypt, Cyprus and Malta followed.

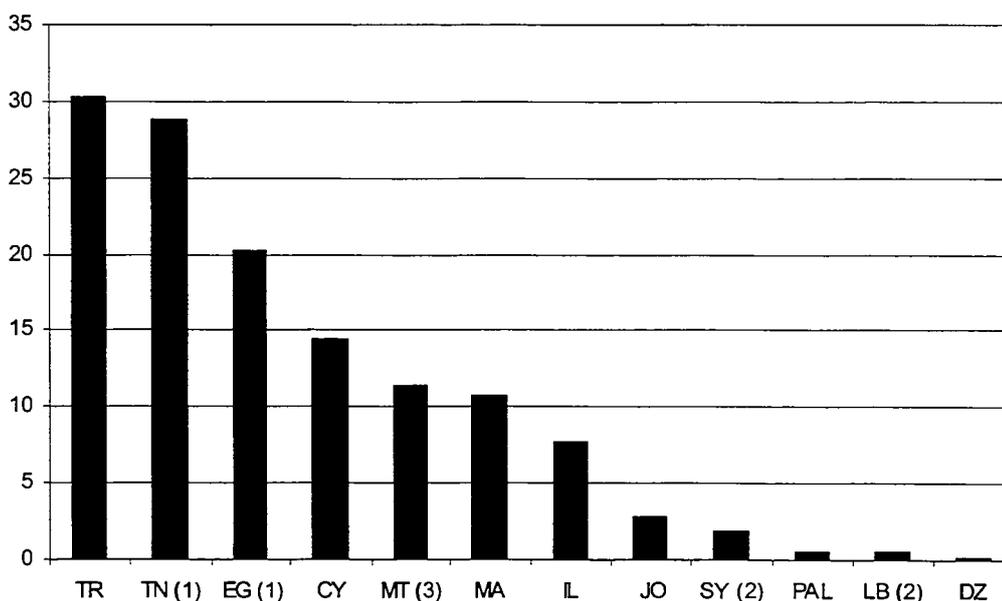
Data for 1998 show a positive trend in nights spent by non-residents in hotels and similar establishments in the Mediterranean countries. Compared to 1995, figures indicate a 16.3% increase.

**Table 2.7 - Nights spent in hotels and similar establishments in the Mediterranean countries, non-residents, 1995-1998**

In thousands	1995	1998	Variations 1995-1998 (%)
<b>Total MED-12</b>	<b>111 070</b>	<b>129 179</b>	<b>16.3</b>
DZ	76	109	43.8
MA	8 502	10 676	25.6
TN (1)	23 514	28 788	22.4
EG (1)	20 451	20 151	-1.5
JO (2)	2 836	2 800	-1.3
LB (3)	126	502	298
SY (3)	1 823	1 837	0.8
IL	9 496	7 709	-18.8
PAL (2)	708	565	-20.3
CY	14 181	14 430	1.8
MT (4)	10 919	11 326	3.7
TR	18 438	30 287	64.3

(1) Data refer to all types of tourist accommodation establishments.  
 (2) 1996 data for 1995.  
 (3) 1997 for 1998  
 (4) Days spent by foreign visitors.  
 Source: Eurostat.

**Graph 2.16 - Nights spent in hotels and similar establishments in the Mediterranean countries, non-residents, Mio, 1998**



(1) Data refer to all types of tourist accommodation.  
 (2) 1997 data.  
 (3) Days spent by foreign visitors.  
 Sources: Eurostat.

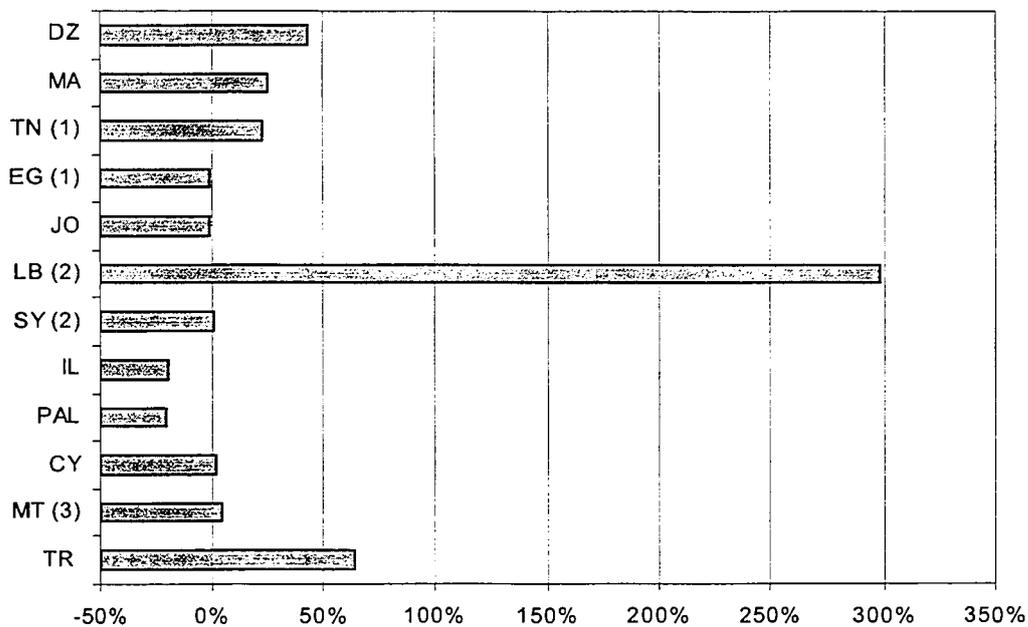
This positive trend can be generalised to most of the countries. In fact, data show that eight countries recorded increases in the total number of nights spent by non-resident tourists in hotels

and similar establishments. Lebanon, Turkey and Algeria reported the highest growth. Morocco and Tunisia followed with increases greater than 20%. Egypt and Jordan suffered slight decreases in nights

spent by foreign tourists (-1.5% and -1.3% respectively) while Palestine and Israel showed a

noticeable negative trend (-20.2% and -18.8% respectively).

**Graph 2.17 - Nights spent by non-residents in hotels and similar establishments in the Mediterranean countries, variations (%), 1995-1998**



(1) Data refer to all types of tourist accommodation.

(2) 1997 data for 1998.

(3) Days spent by foreign visitors.

Source: Eurostat.



## **PART THREE**

# ***TOURIST ACCOMMODATION STRUCTURE***



### 3.1 EU and EFTA countries

#### 3.1.1 Capacity of hotels and similar establishments

The supply of tourist accommodation establishments ranges considerably from hotels and similar establishments to camping sites, holiday dwellings, group tourism and specialised accommodation establishments and private tourist accommodation establishments. The Directive includes statistics on hotels and similar establishments, holiday dwellings, tourist camp-sites and other collective accommodation. Supply trends of these types of accommodation establishments are analysed here.

This chapter focuses on the analysis of the tourist accommodation system for the period 1995-1998.

In 1998 there were more than 183 000 hotels and similar establishments in the European Union, of which more than 125 000 were located within the euro-zone. Adding the four remaining EFTA countries, the number of this type of tourism facilities amounted to over 190 000 units. The accommodation capacity in terms of number of bed-places, amounted to nearly 9 million in the EU, of which almost 8 million in the euro-zone. Globally, EU and EFTA countries together can offer over 9.4 million bed-places to overnight visitors (see table 3.1).

Among the countries having the highest number of hotels and similar establishments, the United Kingdom ranked first in 1998, as it did in 1995. 26% of this type of tourist accommodation in the EU was located in this country. Germany, Italy, France and Austria followed. Altogether these five top countries accounted for over 83% of the total number of hotels and similar establishments in the EU (see graph 3.1).

**Table 3.1 - Number of hotels and similar establishments and their bed-places in the EU and EFTA countries, 1995-1998**

	Establishments			Bed-places		
	Years		Variations 1995-1998 (%)	Years		Variations 1995-1998 (%)
	1995	1998		1995	1998	
<b>EU-15 (1)</b>	<b>189 443</b>	<b>183 015</b>	<b>-1.5</b>	<b>8 661 497</b>	<b>8 995 986</b>	<b>5.9</b>
<b>EUR-11 (1)</b>	<b>133 075</b>	<b>125 124</b>	<b>-3.4</b>	<b>6 781 336</b>	<b>7 952 801</b>	<b>6.4</b>
B	2 038	1998	-2.0	114 887	116 297	1.2
DK (2)	564	467	-2.3	98 991	59 772	-0.5
D	38 226	38 913	1.8	1 494 024	1 547 542	3.6
EL	7 754	7 946	2.5	557 188	584 834	5.0
E (3)	10 422	7 539	n.c.	1 031 684	979 325	n.c.
F	20 147	19 555	-2.9	1 193 340	1 451 129	21.6
IRL (4)	5 039	5 164	2.5	96 900	107 425	10.9
I (5)	34 296	30 313	-11.6	1 738 031	1 772 096	2.0
L	369	342	-7.3	14 748	14 709	-0.3
NL (6)	1 749	2788	-1.4	142 516	169 078	1.3
A (6)	18 120	15780	-2.4	646 125	584 889	-1.9
P	1 733	1 754	1.2	204 051	215 572	5.6
FIN	936	978	4.5	105 030	112 289	6.9
S	1 829	1 891	3.4	173 759	184 545	6.2
UK	46 221	47 587	3.0	1 050 223	1 096 484	4.4
IS	211	253	19.9	9 752	12 030	23.4
LI (7)	52	52	0.0	1 333	1 385	3.9
NO	1 179	1 176	-0.3	131 217	137 188	4.6
CH	6 081	5 892	-3.1	264 983	261 391	-1.4

(1) Variations exclude Spain.

(2) Only hotels with at least 40 bed-places. Change in methodology in 1996: variations refer to 1996-1998.

(3) Change in methodology in 1997. Data are not comparable.

(4) 1998 data refer to 1997. Variations refer to 1995-1997.

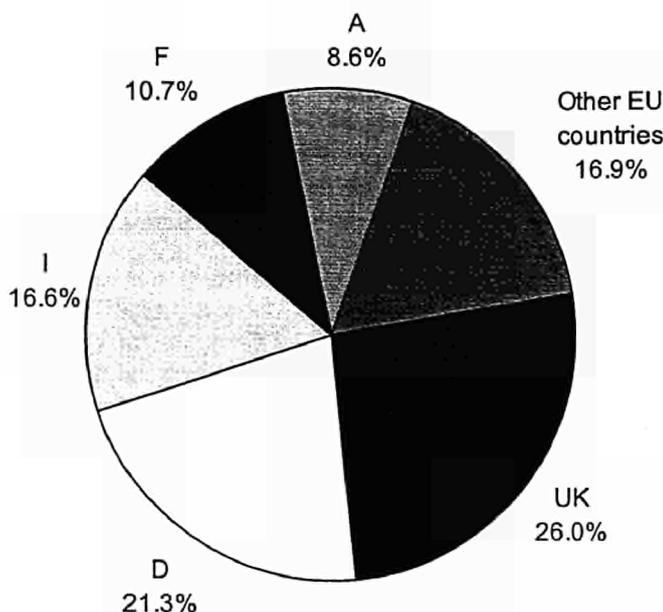
(5) 1998 data on bed-places refer to 1997.

(6) Change in methodology in 1998: variations refer to 1995-1997.

(7) 1995 data refer to 1996. Variations refer to 1996-1998.

Source: Eurostat.

**Graph 3.1 - National shares on the total number of hotels and similar establishments in the EU, (%), 1998**



Source: Eurostat.

Concerning the supply of bed-places in 1998, Italy still held the strongest accommodation capacity, with over 1.7 million bed-places. They represented about 20% of the total number of bed-places in hotels and similar establishments of the EU, and 25% of the total number of bed-places of the euro-zone. Germany followed with over 1.5 million beds, and France with more than 1.4 million beds. The top five countries, including Spain and the United Kingdom, constituted over 76% of all bed-places available in the EU in hotels and similar establishments.

Compared to 1995, figures for 1998 show a moderate decrease in the number of establishments in the EU (-1.5%) and a more marked drop in the euro-zone (-3.4%). The EU and the EFTA countries suffered globally a decrease of -1.5%. These decreases in the number of units were accompanied by a growth in the number of bed-places in the EU, euro-zone and the EU+EFTA countries: +5.9%, 6.4% and 5.7% respectively.

At national level contrasting trends either in terms of direction or intensity occurred in the development of hotels and similar establishments between 1995 and 1998. The Northern European countries reported the highest increases: Iceland registered a significant growth of nearly 20% and Finland and Sweden experienced noticeable increases of 4.5% and 3.4% respectively. On the other hand, Italy and Luxembourg

showed the highest declines with percentage variations of -11.6% and -7.3% respectively.

Compared to 1995, in 1998 most of the European countries expanded the number of bed-places, some of them to a significant extent: Iceland increased its capacity by over 23% and France by over 21%. Ireland followed with an increase of nearly 11%. Moreover, none of the European countries registered very significant reductions (see graph 3.2).

### 3.1.2 Regional trends

The two maps below, which refer to 1997 data, show the number of hotels and similar establishments per 100 000 inhabitants and the number of bed-places per 1 000 inhabitants at regional level (NUTS II).

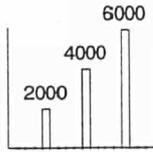
According to the available data, Tirol (Austria), with more than 900 establishments per 100 000 inhabitants, recorded the highest concentration. Trentino-Alto Adige (Italy) and Notio Aigaio (Greece) followed with over 600 establishments each. 24 EU regions had more than 120 hotels per 100 000 inhabitants and six Austrian regions are among them. In absolute values, Trentino-Alto Adige (Italy), Tirol (Austria) and Switzerland are the first regions of the ranking, with approximately 6 000 hotels and similar establishments each. Emilia Romagna (Italy) and Ireland followed with over 5 000 establishments.

# Accommodation capacity in hotels and similar establishments 1997, NUTS 2

Number of hotels and similar establishments per 100 000 inhabitants

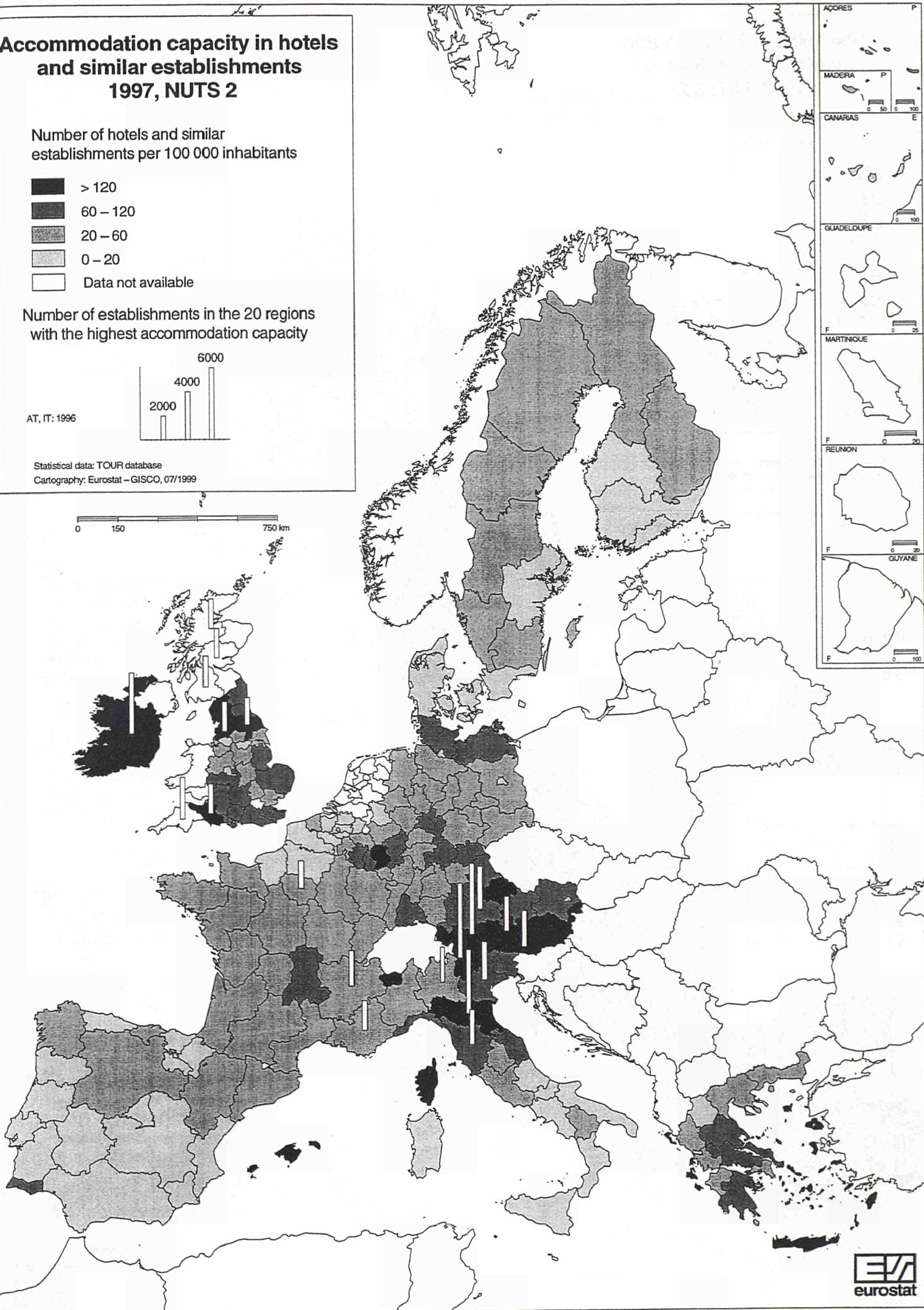
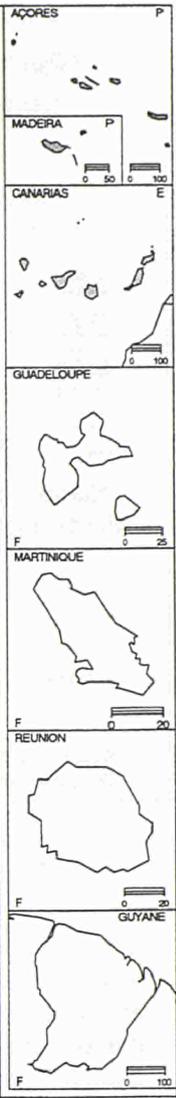


Number of establishments in the 20 regions with the highest accommodation capacity



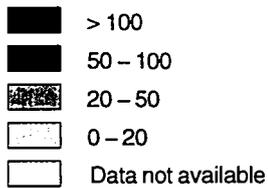
AT, IT: 1996

Statistical data: TOUR database  
Cartography: Eurostat – GISCO, 07/1999

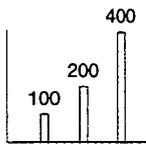


# Bed-places in hotels and similar establishments 1997, NUTS 2

Number of bed-places  
per 1 000 inhabitants

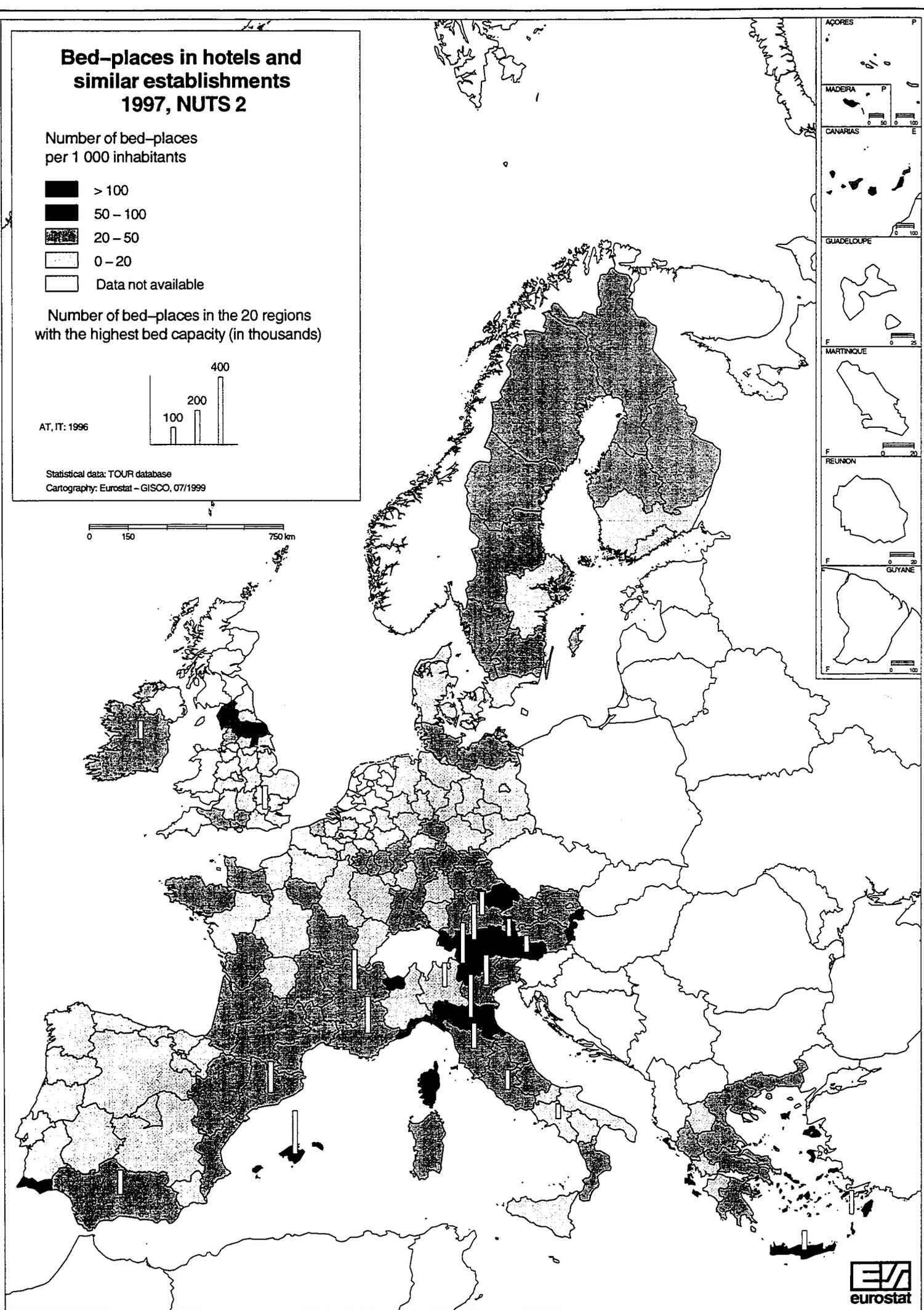
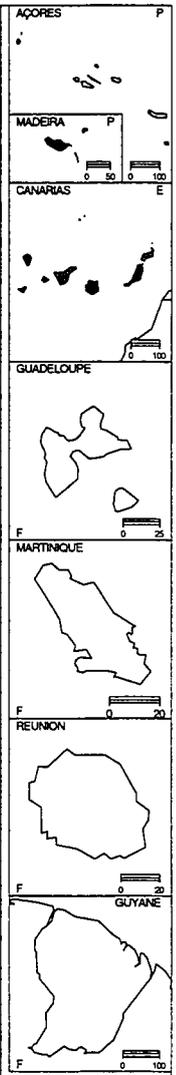


Number of bed-places in the 20 regions  
with the highest bed capacity (in thousands)

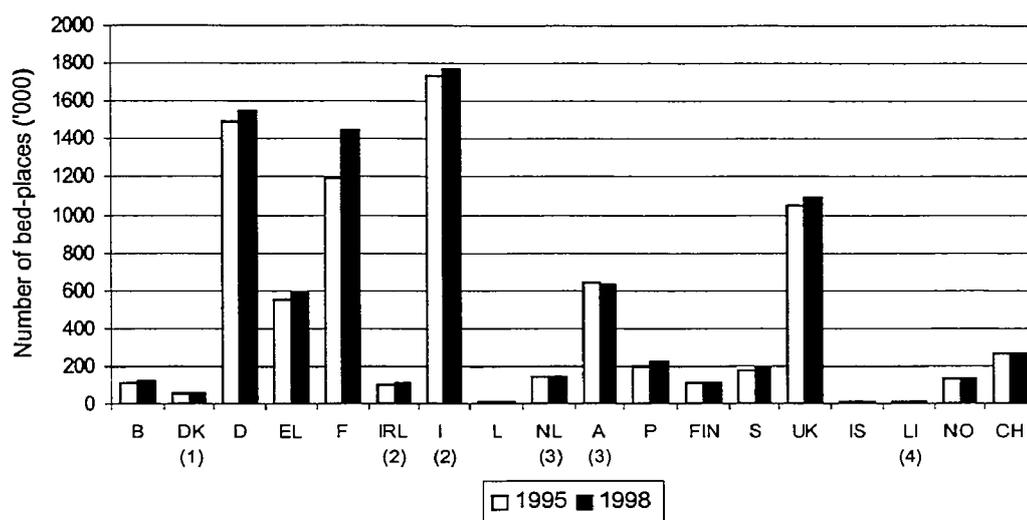


AT, IT: 1996

Statistical data: TOUR database  
Cartography: Eurostat - GISCO, 07/1999



**Graph 3.2 - Bed-places in hotels and similar establishments in the EU and EFTA countries, ('000), 1995-1998**



- (1) Only hotels with at least 40 bed-places. Change in methodology in 1996: variation refers to 1996-1998.  
 (2) 1997 data for 1998.  
 (3) Change in methodology in 1998: variations refer to 1995-1997.  
 (4) 1996 data for 1995.  
 Source: Eurostat.

Notio Aigaio (Greece) reported the highest concentration of bed-places, with over 513 bed-places per 1 000 inhabitants. Islas Baleares (Spain) and Tirol (Italy) followed with over 300 beds each. 12 EU regions had more than 100 bed-places per 1 000 inhabitants: four Greek regions and four Austrian regions are among them. However, most of the EU regions are included in the two classes "20-60 beds" and "0-20 beds" per 1 000 inhabitants. In absolute values, Île de France (France), Switzerland, Emilia Romagna (Italy) and Islas Baleares (Spain) are the first regions of the ranking, with over 250 000 beds in hotels and similar establishments. Rhône-Alpes (France) and Trentino-Alto Adige (Italy) followed with approximately 240 000 beds.

### 3.1.3 Average size of hotels and similar establishments

The average size of hotels and similar establishments is an interesting structure indicator of the tourist accommodation system of a country and of its changes over time. Moreover, usually newer hotel facilities tend to be larger in size than in the past for reasons of management efficiency and economies of scale.

Nonetheless, while reading this section it should be kept in mind that the indicator is biased by the different thresholds adopted by the countries. Establishments are usually considered in statistics only if they reach a minimum number of bed-places.

This threshold varies from country to country (e.g.: in Denmark is fixed to 40 bed-places, in Norway to 20, in Germany to 8). The exclusion of small establishments inflates the average for each country, and the use of the different threshold affects the comparison among countries. In spite of this methodological drawback, the indicator still provides some interesting information.

In 1998 the average size of hotels and similar establishments was over 45 bed-places per unit in the EU, over 51 in the euro-zone and 46 in the EU and EFTA countries altogether.

Five European countries had more than 100 bed-places per unit, showing an average size significantly higher than the European average level. Among them, Spain recorded the highest average size with almost 130 beds per establishment. Denmark, Portugal, Norway and Finland followed, with an average size ranging from 128 to 115 beds per unit (see table 3.2 and graph 3.3).

On the other hand, Ireland and the United Kingdom had the lowest average size units, reaching almost 21 and 23 beds per hotel respectively. Also far below the European average size are Liechtenstein, Austria, Germany and Luxembourg.

With respect to 1995, in 1998 there was a general increase in the average size of hotels and similar establishments in Europe. The growth was of 7.5% in the EU, 10.1% in the euro-zone and 7.3% in the EU and EFTA countries as a whole. The trend can be generalised to almost all the European countries.

**Table 3.2 - Average size of hotels and similar establishments, 1995-1998**

	1995	1998	Variations 1995-1998 (%)
EU-15 (1)	42.4	45.6	7.5
EUR-11 (1)	46.9	51.6	10.1
B	56.4	58.2	3.3
DK (2)	125.7	128.0	1.8
D	39.1	39.8	1.8
EL	71.9	73.6	2.4
E (3)	99.0	129.9	n.c.
F	59.2	74.2	25.3
IRL (4)	19.2	20.8	8.2
I	50.7	52.4	3.4
L	40.0	43.0	7.6
NL (5)	81.5	83.7	2.7
A (5)	35.7	35.8	0.4
P	117.7	122.9	4.4
FIN	112.2	114.8	2.3
S	95.0	97.6	2.7
UK	22.7	23.0	1.4
IS	46.2	47.5	2.9
LI (6)	25.6	26.6	3.9
NO	111.3	116.7	4.8
CH	43.6	44.4	1.8

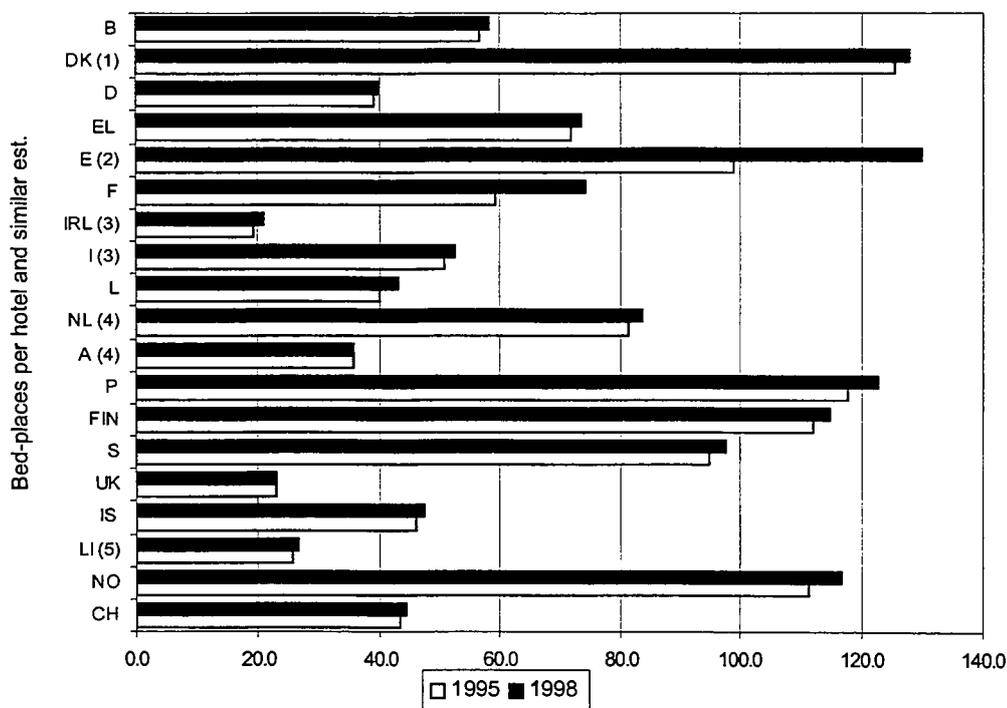
- (1) Variations exclude Spain.
  - (2) Only hotels with at least 40 bed-places. Change in methodology in 1996: variation refers to 1996-1998.
  - (3) Change in methodology in 1997. Data are not comparable.
  - (4) 1997 data for 1998.
  - (5) Change in methodology in 1998: variations refer to 1995-1997.
  - (6) 1996 data for 1995.
- Source: Eurostat.

The highest growth in percentage terms as well as in absolute values occurred in France (+ 25%, i.e. +15 beds per unit). Ireland and Luxembourg followed showing an increase of 8.2% and 7.6% respectively (in absolute values equal to +1.6 and +3.0 beds per unit respectively).

The growth in the average size of hotels may have different explanations. It could be the result of an increase both in the number of accommodation units and bed-places. This implies a real growth in tourism supply that tends towards larger hotels compared to the past years. According to available data, half of the European countries belonged to this group (see table 3.3).

On the other hand, the phenomenon can be the result of a drop in the number of units accompanied by an increase or by a smaller reduction in the number of bed-places than in the number of hotels. This is probably due to a re-organisation of tourism supply whereby small, marginal or less efficient establishments are eliminated. This is generally typical of countries with a consolidated tourism tradition, where accommodation facilities are typically and traditionally made up of small, family-run businesses. Between 1995 and 1998 tourist accommodation systems of half of the European countries seemed to have undertaken this re-organisation.

**Graph 3.3 - Average size of hotels and similar establishments, 1995-1998**



- (1) Only hotels with at least 40 bed-places. Change in methodology in 1996: variation refers to 1996-1998.
  - (2) Change in methodology in 1997. Data are not comparable.
  - (3) 1997 data for 1998.
  - (4) Change in methodology in 1998: variation refers to 1995-1997.
  - (5) 1996 data for 1995.
- Source: Eurostat.

**Table 3.3 - Structural changes of hotels and similar establishments, 1995-1998**

	Hotels Changes (%)	Bed-places Changes (%)	Hotel size Changes (%)	
B	-2.0	1.2	3.3	Reorganisation
DK (1)	-2.3	-0.5	1.8	Reorganisation
D	1.8	3.6	1.8	Growth
EL	2.5	5.0	2.4	Growth
F	-2.9	21.6	25.3	Reorganisation
IRL (2)	2.5	10.9	8.2	Growth
I (2)	-11.6	2.0	3.4	Reorganisation
L	-7.3	-0.3	7.6	Reorganisation
NL (3)	-1.4	1.3	2.7	Reorganisation
A (3)	-2.4	-1.9	0.4	Reorganisation
P	1.2	5.6	4.4	Growth
FIN	4.5	6.9	2.3	Growth
S	3.4	6.2	2.7	Growth
UK	3.0	4.4	1.4	Growth
IS	19.9	23.4	2.9	Growth
LI (4)	0.0	3.9	3.9	Growth
NO	-0.3	4.6	4.8	Reorganisation
CH	-3.1	-1.4	1.8	Reorganisation

(1) Changes refer to 1996-1998.

(2) 1997 data for 1998.

(3) Changes refer to 1995-1997.

(4) 1996 data for 1995.

Source: Eurostat.

### 3.1.4 Trends in occupancy and variations of capacity in hotels and similar establishments

In an attempt to analyse the trend of tourism supply a simple relationship could be established with the former and the trend in tourism demand flows. This could provide some information on a potential relation between demand trend and supply behaviour. It could be verified whether the increase (decrease) in nights spent by tourists in hotels and similar establishments is accompanied by an increase (decrease) in the accommodation capacity. This initial analysis examines a homogeneous period ranging from 1995 to 1998, and it does not take into consideration the time gaps between the demand trend and the reaction of market supply. Moreover, according to the scientific literature in the field<sup>6</sup>, other factors should be included in the analysis: (1) since an hotel is a medium-long term activity, it is built according to expected and not actual flows of tourists; (2) the investment in hotel sector is very rigid, with high exit costs; (3) at local and regional scale the dynamics of supply influence the dynamics of demand. In spite of the simplicity of the approach adopted, this paragraph gives some interesting information about the harmony of the direction and intensity of the supply and demand trends.

<sup>6</sup> Among others: Thomas F. Powers, 1995, *Introduction to management in the hospitality industry*, Wiley, New York; Renaud Bertrand, 1996, *The 1985-1994 global real estate cycle*, OECD working Paper no. 1452; Donald E. Lundberg, M. Krishnamoorthy, Mink H. Stavenga, 1998, *Tourism economics*, John Wiley & Sons, Inc., New York; Alberto Sessa, 1998, *Elements of tourism economics*, catal, Roma.

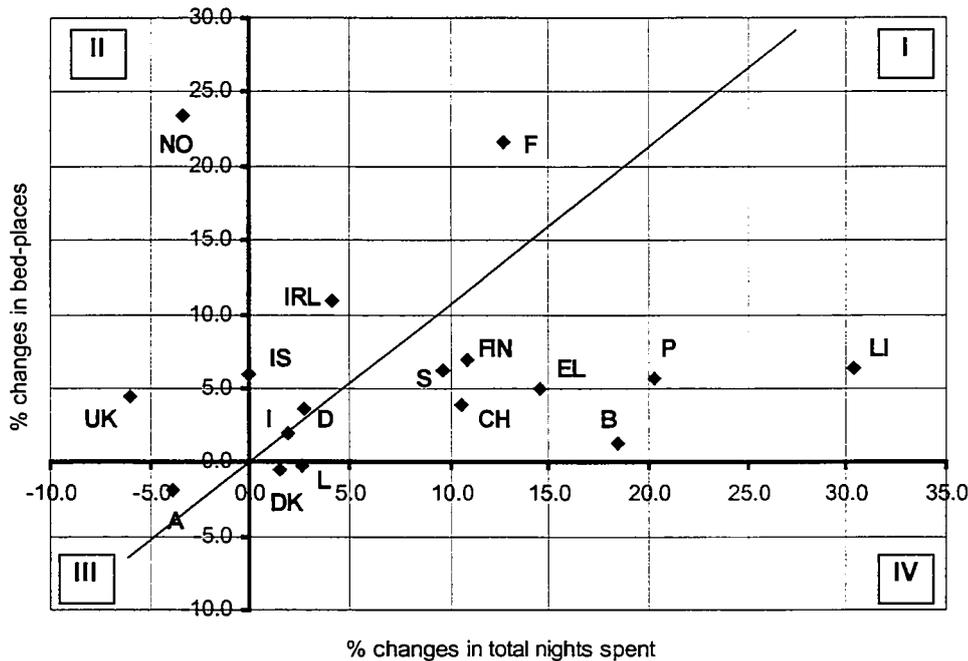
Graph 3.4 puts on the same plane the percentage variation of nights spent by residents and non-residents in hotels and similar establishments and the percentage variation of the number of bed-places in hotels and similar establishments, for the period 1995-1998.

Squares I and III show the cases where the demand and supply trends go to the same direction, i.e. when one of them rises, so does the other and when one of them falls, so does the other. Square II contains the cases where a decrease in demand is accompanied by an increase in supply, i.e. expanding supply does not react to shrinking demand. In square IV an increase in demand is accompanied by a decrease in supply. In this case, a profitable tourism product determines the elimination of most unused (marginal) beds, making the system more efficient.

Most of the countries surveyed<sup>7</sup> are located in square I; therefore it can be claimed that supply and demand trends in these countries were in harmony with each other, though at varying degrees.

<sup>7</sup> Spain and the Netherlands are not included in the analysis. For Spain data on number of bed-places are not comparable (see table 3.1). For the Netherlands data on number of nights spent in hotels and similar establishments are not comparable (see table 2.1).

**Graph 3.4 - Nights spent and number of bed-places in hotels and similar establishments, variations (%), 1995-1998**



Source: Eurostat.

Concerning the position of these countries with respect to the line describing the balance between demand and supply variations (the angle bisector), in the cases located under the line in the first square, the expansion of supply was less than proportional to the increase in demand. This could mean that the supply in these countries was moving towards a more efficient use of the accommodation capacity available. In the countries above the angle bisector the growth in supply is more than proportional to the increase in demand. This could mean a shift towards an over-expansion of accommodation capacity.

**3.1.5 Use of bed-places in hotels and similar establishments**

The net occupancy rate expresses the capacity to fully utilise establishments during the period in which they are open. Usually the highest levels coincide with countries that have good performances in the tourist market.

Available data show that in 1998 Spain was the country with the highest net occupancy rate (61.2%). Two other countries of the European Mediterranean region, namely France and Greece, followed with a net use of bed-places over 50%. Portugal and a group of Northern European countries, namely the United Kingdom, the Netherlands and Denmark,

followed with a net occupancy rate of more than 40%. On the other side, the lowest values were reported by Luxembourg and Liechtenstein (see table 3.4).

**Table 3.4 - Net use of bed-places in hotels and similar establishments, 1995-1998**

	1995 (%)	1998 (%)	Variations 1995-1998
EU-15	:	:	
EUR-11	:	:	
B	26.8	31.6	4.8
DK	35.5	41.6	6.1
D	33.9	32.1	-1.8
EL	56.3	51.8	-4.5
E	58.3	61.2	2.9
F	50.1	55.6	5.5
IRL	51.0	:	:
I	40.0	38.6	-1.4
L	:	23.5	:
NL	37.0	45.0	8.0
A	31.8	:	:
P	46.3	44.3	-2.0
FIN	35.1	37.8	2.7
S	35.0	33.1	-1.9
UK	39.0	43.1	4.1
IS	35.6	32.8	-2.8
LI	27.7	27.1	-0.6
NO	34.7	37.9	0.0
CH	38.5	38.9	0.4

Source: Eurostat.

Half of the countries providing data for both 1995 and 1998 registered an increase in the net occupancy rate of bed-places in hotels and similar establishments.

### 3.1.6 Capacity of other collective accommodation

In 1998 there were nearly 90 000 other collective accommodation establishments in the European Union and almost 76 000 in the euro-zone. The accommodation capacity reached nearly 12 million bed-places in the EU and 9.5 million in the euro-zone (see table 3.5).

Adding the four EFTA countries, the number of establishments attained more than 95 000 units offering over 12.5 million beds to overnight visitors.

In 1998 Italy was the country with the highest number of this type of establishments, representing alone about 40% of the EU supply (see graph 3.5). It had more than two times the number of establishments as Germany, the country coming in second place.

The United Kingdom (13% share) and France (10% share) followed.

Between 1995 and 1998, the number of other collective accommodation establishments increased by 7% in the EU, 5.7% in the euro-zone and 6.8% in the EU and EFTA countries as a whole. At country level the evolution of this type of tourist accommodation revealed contrasting trends.

The United Kingdom showed the most remarkable growth (approximately 18%). Greece and the Netherlands also reported solid increases of almost 15% and of 13.6% respectively. On the other side, Liechtenstein (-12.6%) and France (-5.6%) recorded significant contractions.

In 1998, France, with over 2.9 million beds, confirmed to be the EU leader as regards capacity in other collective accommodations. In 1998 it accounted on its own for nearly 25% of the total number of beds of the EU. Italy and the United Kingdom followed with a share of almost 15% each.

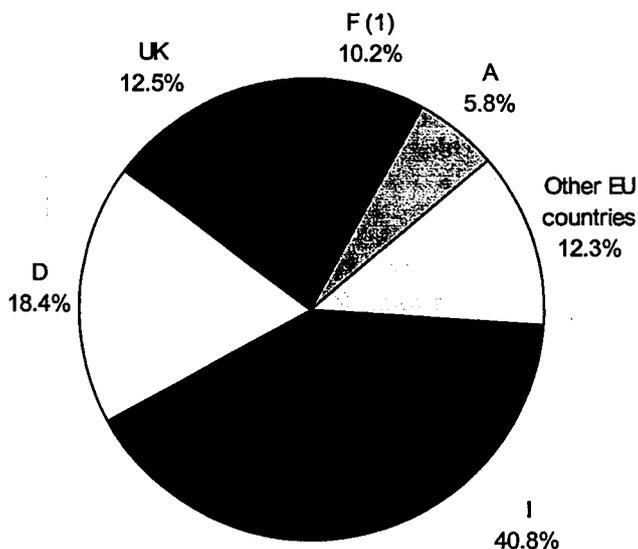
**Table 3.5 - Number of other collective accommodation and their bed-places in the EU and EFTA countries, 1995-1998**

	Establishments			Bed-places		
	Years		Variations	Years		Variations
	1995	1998	1995-1998 (%) (1)	1995	1998	1995-1998 (%) (1)
EU-15	73 012	89 651	7.0	10 684 417	11 988 760	1.3
EUR-11	60 970	75 869	5.7	9 001 800	9 448 842	1.7
B	1 667	1 655	-0.7	1 070 112	1 068 161	-0.2
DK	623	627	0.6	316 969	317 760	0.2
D	11 678	16 459	7.9	1 008 222	1 450 600	3.3
EL	296	340	14.9	90 217	97 280	7.8
E	1 130	1 142	1.1	622 432	667 044	7.2
F	9 709	9 169	-5.6	3 330 430	2 979 209	-0.6
IRL	4 334	2 375	n.c.	33 301	55 034	n.c.
I	26 450	36 566	8.4	1 580 803	1 772 300	1.8
L	302	320	6.0	52 912	52 638	-0.5
NL	1 947	2 212	13.6	664 024	713 226	7.4
A	2 985	5 207	1.4	278 889	323 629	0.5
P	223	227	1.8	264 758	267 215	0.9
FIN	545	537	-1.5	95 917	99 786	4.0
S	1 612	1 601	-0.7	400 000	365 205	-8.7
UK	9 511	11 214	17.9	875 431	1 759 673	n.c.
IS	206	294	4.3	654	822	25.7
LI	95	83	-12.6	515	471	-8.5
NO	760	1 235	n.c.	13 000	116 984	n.c.
CH	3 837	3 946	2.8	453 081	443 611	-2.1

(1) Due to changes in methodology occurred in several countries and to the lack of information for some types of collective accommodation, sometimes variations refer to a different period than 1995-1998. For further details, please, read carefully the technical note on page 57.

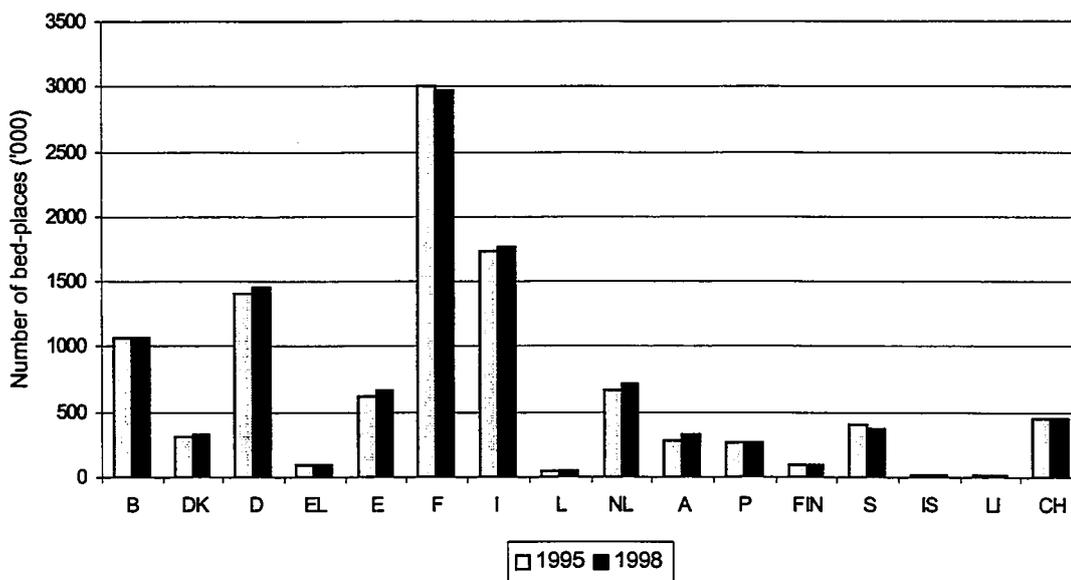
Source: Eurostat.

**Graph 3.5 - National shares on total number of other collective accommodation in the EU, (%), 1998**



(1) Campsites only  
Source: Eurostat.

**Graph 3.6 - Bed-places in other collective accommodation in the EU and EFTA countries, ('000), 1995-1998**



Note: the same notes to table 3.5 apply to this graph.  
Source: Eurostat.

Compared to 1995, in 1998 the capacity of other collective accommodation increased slightly in the EU, in the euro-zone and in the EU and EFTA countries (1.3%, 1.7% and 1.2% respectively). Within the EU, three countries expanded the number of beds by over 7%, namely Greece, the Netherlands and Spain. On the other hand, available data showed a considerable decrease of the capacity in other collective accommodation in Sweden (-8.7%) and Liechtenstein (-8.5%) (see graph 3.6).

### 3.2 Central European Countries

#### 3.2.1 Capacity of hotels and similar establishments

In 1998 there were over 12 000 hotels and similar establishments in the Central European Countries (CECs) with an accommodation capacity of more than 1 million bed-places (see table 3.6).

The Czech Republic reported the highest number of units, representing by its own 30% of the total number of this type of tourist accommodation in the 14 countries considered. Almost another 33% of hotels and similar establishments were located in Romania and Hungary together, and the remaining 37% in the other eleven countries (see graph 3.7).

Croatia, the Czech Republic and Romania showed the largest accommodation capacities, with approximately 200 000 bed-places each. Altogether, these three countries held almost 54% of the total number of bed-places in hotels and similar establishments in the 14 countries considered.

Between 1995 and 1998, figures showed an average increase of over 17% in the number of establishments and almost 6% in the number of bed-places in the CECs analysed. Several countries reported extraordinary growth in the number of hotels and similar establishments, some of them a substantial stability and few of them moderate decreases.

Bosnia and Herzegovina registered the highest growth. Albania and Poland followed with expansions of 55% and 48% respectively. On the other hand, Croatia registered a substantial stability (-0.8%) in the number of establishments, while Bulgaria experienced a moderate decrease (-2.5%).

With few exceptions, the countries considered reported positive trends also in the number of bed-places. Once again, Bosnia and Herzegovina recorded the highest increase and Albania and Poland followed (see graph 3.8).

**Table 3.6 - Number of hotels and similar establishments and their bed-places in the CECs, 1995-1998**

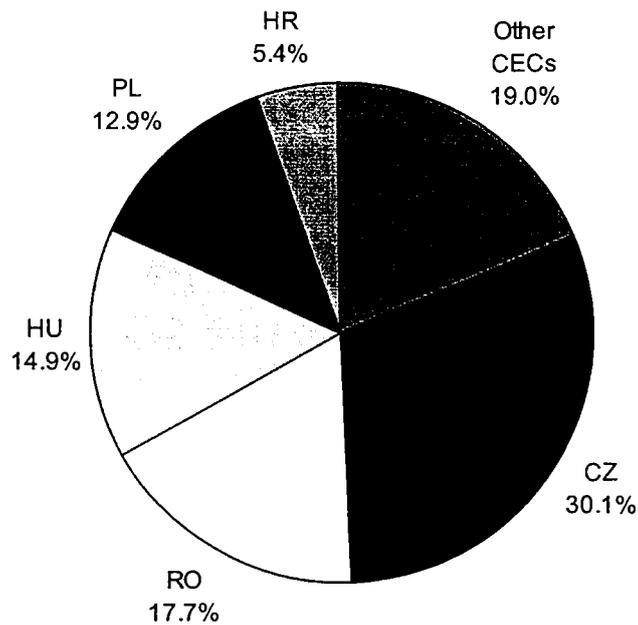
	Establishments			Bed-places		
	Years		Variations 1995-1998 (%)	Years		Variations 1995-1998 (%)
	1995	1998		1995	1998	
<b>Total (1)</b>	<b>8 659</b>	<b>12 189</b>	<b>17.2</b>	<b>974 565</b>	<b>1 111 207</b>	<b>5.9</b>
AL	75	116	54.7	3 490	5 208	49.2
BA	19	67	252.6	1 910	6 371	233.6
BG	526	513	-2.5	118 112	112 002	-5.2
HR	661	656	-0.8	205 234	199 571	-2.8
CZ (2)	1 387	3 669	n.c.	117 198	202 957	n.c.
EE	160	204	27.5	10 576	11 856	12.1
MK	112	123	9.8	15 032	15 955	6.1
HU	1 501	1 817	21.1	119 109	136 413	14.5
LV	135	148	9.6	13 376	13 613	1.8
LT	143	201	40.6	9 765	11 714	20.0
PL	1 068	1 576	47.6	93 309	120 589	29.2
RO	2 118	2 154	1.7	197 418	195 394	-1.0
SK	447	543	21.5	39 281	48 887	24.5
SL	307	402	30.9	30 755	30 677	-0.3

(1) Variations exclude the Czech Republic.

(2) Change in methodology in 1996 and 1997.

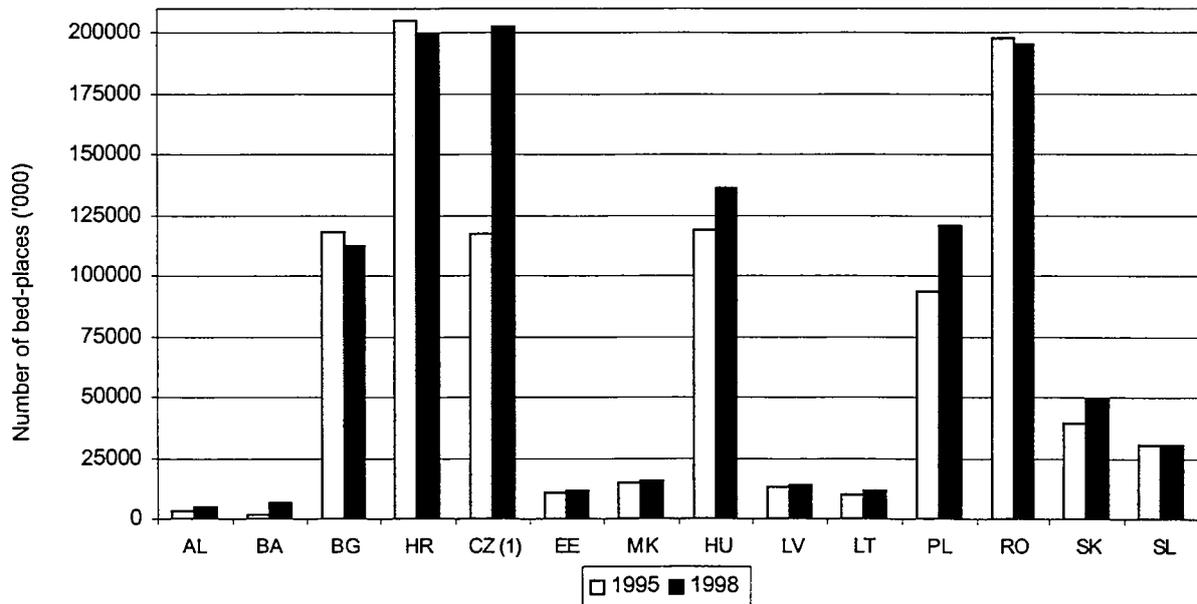
Source: Eurostat.

**Graph 3.7 - National shares on the total number of hotels and similar establishments in the CECs, (%), 1998**



Source: Eurostat.

**Graph 3.8 - Bed-places in hotels and similar establishments in the CECs, ('000), 1995-1998**



(1) Change in methodology in 1996 and 1997.  
Source: Eurostat.

### 3.2.2 Average size of hotels and similar establishments

In 1998 the average size of hotels and similar establishments in the 14 CECs considered was 91.2 beds per unit. Compared to 1995 there was a decrease of almost 10%.

Croatia had the highest average hotel size, with 304.2 beds per establishment (well above the CECs average). Bulgaria ranked the second place with about 218 beds per unit.

The Former Yugoslav Republic of Macedonia followed with nearly 130 beds per hotel. Albania had the lowest average size reaching 45 beds per hotel. Also well below the CECs average were the Czech Republic (55.3) Lithuania (58.3), and Estonia (58.1).

**Table 3.7 - Average size of hotels and similar establishments, 1995-1998**

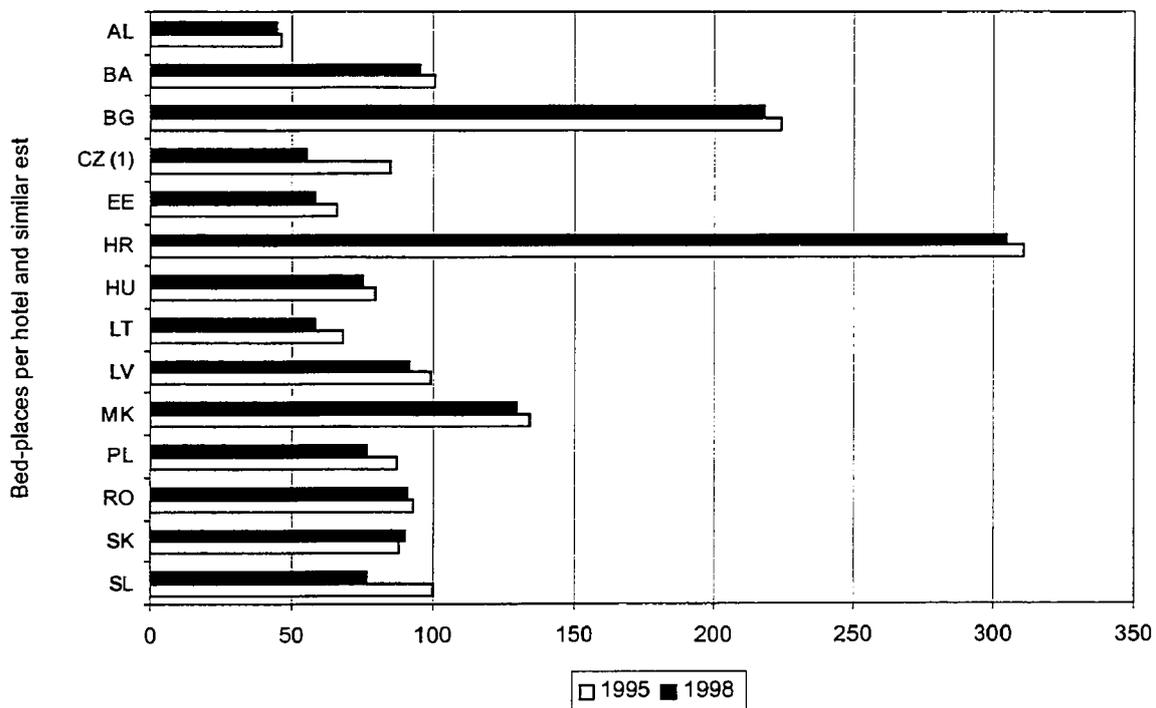
	Years		Variations
	1995	1998	1995-1998 (%)
<b>Total (1)</b>	<b>112.5</b>	<b>91.2</b>	<b>9.6</b>
AL	46.5	44.9	-3.5
BA	100.5	95.1	-5.4
BG	224.5	218.3	-2.8
HR	310.5	304.2	-2.0
CZ (2)	84.5	55.3	n.c.
EE	66.1	58.1	-12.1
MK	134.2	129.7	-3.4
HU	79.4	75.1	-5.4
LV	99.1	92.0	-7.2
LT	68.3	58.3	-14.7
PL	87.4	76.5	-12.4
RO	93.2	90.7	-2.7
SK	87.9	90.0	2.5
SL	100.2	76.3	-23.8

(1) Variation between 1995 and 1998 excludes the Czech Republic.

(2) Change in methodology in 1996 and 1997.

Source: Eurostat.

**Graph 3.9 - Average size of hotels and similar establishments, 1995-1998**



(1) Change in methodology in 1996 and 1997.

Source: Eurostat.

In 1998, nearly all countries revealed an average hotel size decrease with respect to 1995. Slovenia registered the strongest contraction in percentage

terms as well as in the number of bed-places per hotel (-23.8% and - 23.9 beds per unit). Lithuania and Poland

followed with decreases of 14.7% (-10.9 beds per hotel) and 12.4% (-10 beds per hotel) respectively.

### 3.2.3 Use of bed-places in hotels and similar establishments

In 1998 the net use of bed-places in hotels and similar establishments in the Central European countries was 35%<sup>8</sup>. Compared to 1995, it increased on the average by 0.5 percentage points (eight countries).

In 1998 Slovenia showed the highest net use of bed-places in hotels and similar establishments, reaching 61.1%, thus showing a substantial stability compared to 1995 (-0.6 percentage points). Hungary ranked the second place with an average net use of bed places of 47.5% and recording a moderate increase (+2.1). Romania followed in third place (39.7%).

**Table 3.8 - Net use of bed-places in hotels and similar establishments in the CECs, 1995-1998**

	1995 (%)	1998 (%)	Variations 1995-1998
Total	:	:	:
AL	31	:	:
BA	:	:	:
BG	36.6	32.4	-4.2
HR	:	:	:
CZ	32	:	:
EE	29	34	5.0
MK	12.9	14	1.1
HU	45.4	47.5	2.1
LV	:	25.8	:
LT	23.1	27.2	4.1
PL	:	:	:
RO	47.5	39.5	-8.0
SK	27.7	32.3	4.6
SL	61.7	61.1	-0.6

Source: Eurostat.

### 3.2.4 Capacity of other collective accommodation

In 1998 there were over 20 000 other collective establishments in the Central European Countries. The accommodation capacity amounted to more than 2 million bed-places (see table 3.9).

**Table 3.9 - Number of other collective establishments and their bed-places in the CECs, 1995-1998**

	Establishments			Bed-places		
	Years		Variations 1995-1998 (%)	Years		Variations 1995-1998 (%)
	1995	1998		1995	1998	
Total (1)	13 002	20 188	37.1	1 740 399	2 021 621	12.8
AL	1	:	:	1 941	:	:
BA	2	4	100.0	:	132	:
BG	280	213	-23.9	22 389	20 707	-7.5
HR (2)	254	391	n.c.	549 103	525 402	n.c.
CZ (2)	1 236	4 016	n.c.	178 096	355 254	n.c.
EE	:	:	:	:	:	:
MK	202	186	-7.9	33 324	33 469	0.4
HU	720	894	24.2	134 440	150 689	12.1
LV	74	63	-14.9	4 815	4 173	-13.3
LT	332	311	-6.3	27 335	24 362	-10.9
PL	8 277	11 861	43.3	621 526	671 219	8.0
RO (3)	787	973	23.6	92 121	91 874	-0.3
SK	454	843	85.7	38 693	101 987	163.6
SL	383	433	13.1	36 616	42 353	15.7

(1) Establishments: 1995 total excludes Estonia; 1998 total excludes Albania and Estonia; variation excludes Croatia, Czech Republic and Estonia. Bed-places: 1995 total excludes Bosnia and Herzegovina and Estonia; 1998 total excludes Albania and Estonia; variation excludes Albania, Bosnia and Herzegovina, Croatia, Czech Republic and Estonia.

(2) Change in methodology in 1996 and 1997.

(3) Bed-places: excluding holiday dwellings.

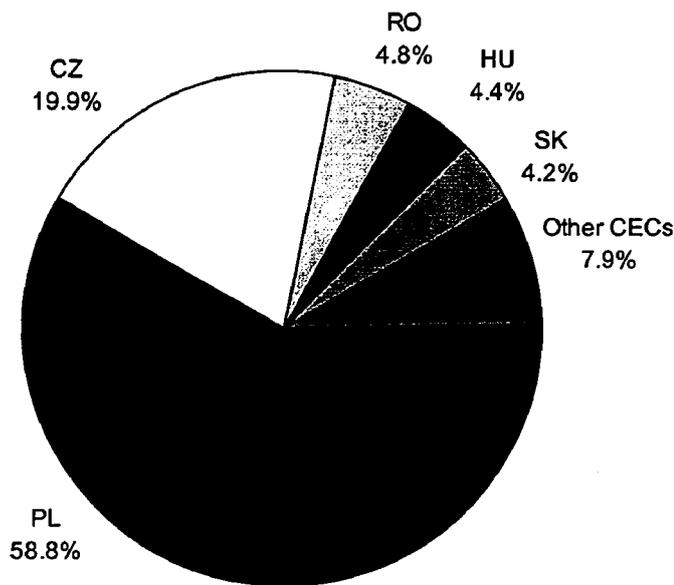
Source: Eurostat.

<sup>8</sup> Excluding Albania, Bosnia and Herzegovina, Croatia, the Czech Republic and Poland.

Poland reported the highest number of other collective establishments, representing by its own over 58% of the total number of this type of tourist accommodation. Almost another 20% were located in the Czech Republic and almost 5% in Romania. Poland, with more than 670 000 bed-places, showed

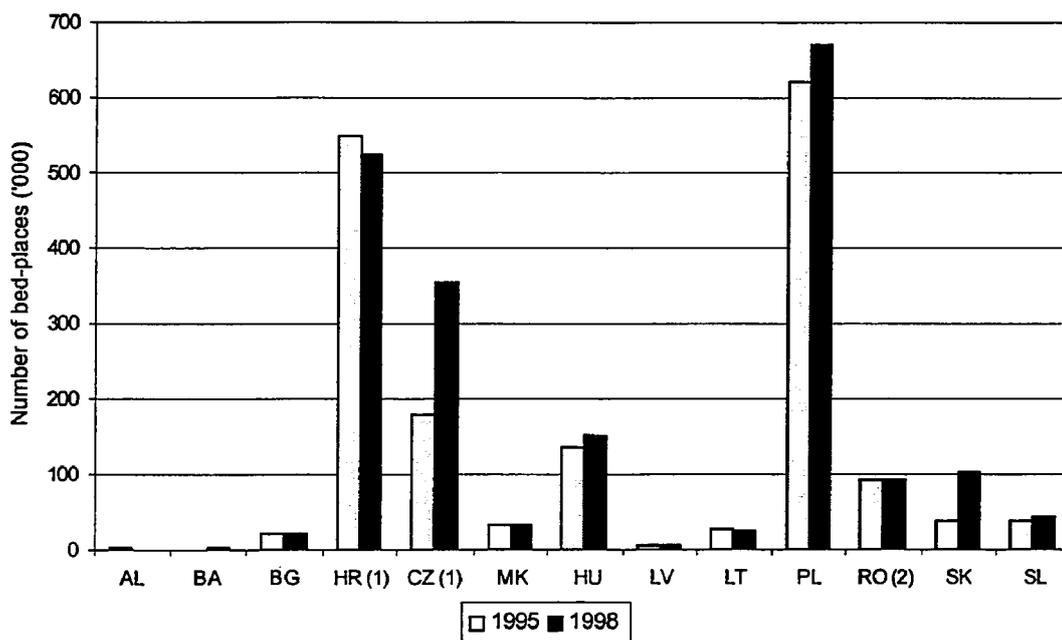
the largest accommodation capacity representing 33% of the total. Croatia ranked the second place with more than 525 000 bed-places (26%). The Czech Republic and Hungary followed. Altogether, these four countries held 84% of the total bed-places (see graph 3.10).

**Graph 3.10 - National shares on the total number of other collective accommodation in the CECs, 1998**



Source: Eurostat.

**Graph 3.11 - Bed-places in other collective accommodation in the CECs, ('000), 1995-1998**



(1) Change in methodology in 1996 and 1997.

(2) Bed-places: excluding holiday dwellings.

Source: Eurostat.

## Tourism in Europe - Trends 1995-1998

Between 1995 and 1998, figures showed a significant increase of 37.1% in the number of establishments and of 12.6% in the number of bed-places. Slovakia registered the best increment (85.7%). Poland followed with an increase of over 43.3%. The strongest decreases occurred in Bulgaria (-23.9%) and Latvia (-14.9%).

Several countries reported positive trends also in the number of bed-places. Slovakia increased its capacity by more than 160%, Slovenia followed with a growth of nearly 16%. On the other side, Latvia (-13.3%) reported the sharpest decrease (see graph 3.11).

### 3.3 Mediterranean Countries

#### 3.3.1 Capacity of hotels and similar establishments

In 1998 there were over 8 700 hotels and similar establishments in the Mediterranean countries, with an accommodation capacity of over 1.1 million bed-places (see table 3.10).

Compared to 1995, figures for 1998 show a significant increase both in the number of establishments and in

the number of bed-places (+7.3% and +12.4% respectively).

Among the five countries having the highest number of hotels and similar establishments, Turkey ranked first in 1998, as it did in 1995. 22% of this type of tourist accommodation in the Mediterranean countries was located in Turkey. Morocco, Egypt, Algeria and Tunisia followed. Altogether, these five countries accounted for 73.5% of the total number of hotels and similar establishments (see graph 3.12).

Between 1995 and 1998, almost all the countries considered showed increases in the number of hotels and similar establishments. Besides Palestine, that recorded the sharpest growth, also Jordan, Algeria and Tunisia registered solid increases. On the other side, Malta and Syria showed moderate declines in the number of hotels and similar establishments.

In 1998, Turkey, with nearly 307 000 bed-places, held the largest accommodation capacity in hotels and similar establishments. More than one out of four bed-places of this type of tourist accommodation were in Turkey. Tunisia reached 185 000 beds, and Egypt followed with over 155 000 bed-places. The top five countries, including Morocco and Israel, constituted over 75% of all bed-places available in the Mediterranean countries in hotels and similar establishments (see graph 3.13).

**Table 3.10 - Number of hotels and similar establishments and their bed-places in the Mediterranean countries, 1995-1998**

	Establishments			Bed-places		
	Years		Variations 1995-1998 (%)	Years		Variations 1995-1998 (%)
	1995	1998		1995	1998	
<b>MED-12</b>	<b>8 138</b>	<b>8 729</b>	<b>7.3</b>	<b>1 019 680</b>	<b>1 145 839</b>	<b>12.4</b>
DZ	651	780	19.8	62 000	70 981	14.5
MA	1 568	1 560	-0.5	122 956	123 737	0.6
TN (1)	612	692	13.1	161 498	185 000	14.6
EG (2)	1 404	1 451	3.3	135 640	155 644	14.7
JO (3)	294	380	29.3	20 613	27 050	31.2
LB (2)	233	255	9.4	16 228	23 000	41.7
SY (4)	454	446	-1.8	31 449	31 412	-0.1
IL (5)	298	313	5.0	74 939	89 946	20.0
PAL (2)	60	92	53.3	5 838	7 986	36.8
CY	537	580	8.0	77 133	85 161	10.4
MT (6)	260	251	-3.5	37 308	38 932	4.4
TR	1 767	1 929	9.2	274 078	306 990	12.0

(1) Includes classified hotels, non classified hotels, holiday villages, and guest houses

(2) Hotels only.

(3) 1998 data includes also unclassified tourist accommodation, apart-hotels and suites, and motels.

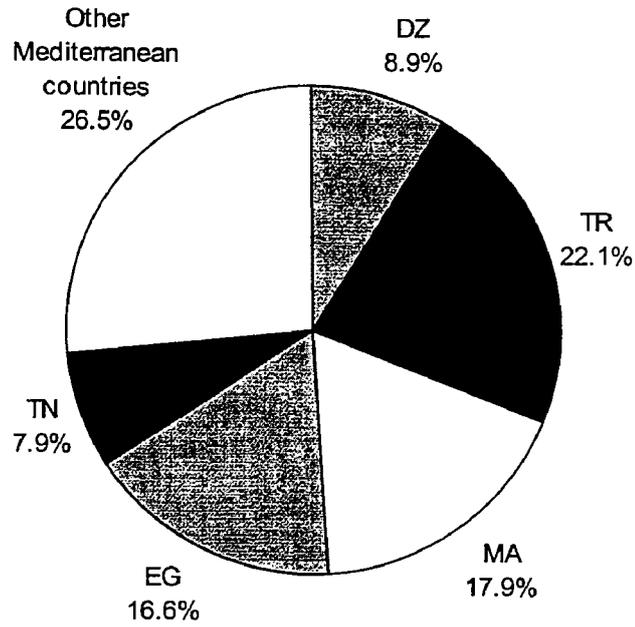
(4) 1997 data for 1998.

(5) at end of year

(6) Includes hotels, complexes, guest houses and hostels.

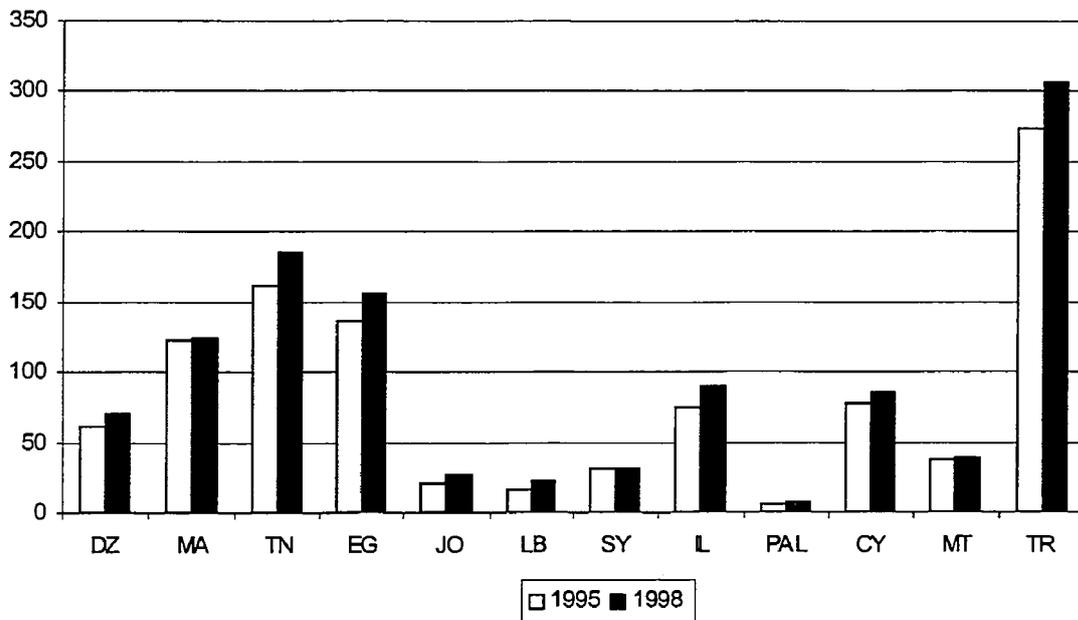
Source: Eurostat.

**Graph 3.12 National shares on the total number of hotels and similar establishments in the Mediterranean countries, (%), 1998**



Source: Eurostat.

**Graph 3.13 - Bed-places in hotels and similar establishments in the Mediterranean countries, ('000), 1995-1998**



Source: Eurostat.

Between 1995 and 1998, most of the countries expanded their supply of bed-places, some of them to a significant extent. The highest variations were recorded in Lebanon, with an increase of over 41%, Palestine (nearly +37%) and Jordan (+31%). Most of the remaining countries experienced growth rates between 10% and 20%. In Morocco and Syria the number of bed-places remained substantially stable (+0.6% and -0.1% respectively).

### 3.3.2 Average size of hotels and similar establishments

In 1998 the average size of units in the Mediterranean countries was 131.3, thus showing an increase of 4.8% (+6.0 beds per unit) with respect to 1995. Usually newer hotel facilities tend to be larger in size than in the past for reasons of management efficiency and economies of scale. The relatively recent tourism tradition in these countries could be an explanation for the high size of their hotels and similar establishments.

Israel and Tunisia recorded the highest average unit size with over 287 and over 267 beds per unit, respectively, thus standing significantly above the average level of the Mediterranean countries. Turkey, with 159 beds per hotels, and Malta, 155 beds per hotel, followed. Syria, Jordan and Morocco had the

lowest average size units, with 70.4, 71.2 and 79.3 beds per hotel respectively. Below the average size are also Algeria, Lebanon and Palestine.

**Table 3.11 - Average size of hotels and similar establishments, 1995-1998**

	Year		Variations 1995-1998 (%)
	1995	1998	
MED-12	125.3	131.3	4.8
DZ	95.2	91.0	-4.4
MA	78.4	79.3	1.2
TN (1)	263.9	267.3	1.3
EG (2)	96.6	107.3	11.0
JO (3)	70.1	71.2	1.5
LB (2)	69.6	90.2	29.5
SY (4)	69.3	70.4	1.7
IL (5)	251.5	287.4	14.3
PAL (2)	97.3	86.8	-10.8
CY	143.6	146.8	2.2
MT (6)	143.5	155.1	8.1
TR	155.1	159.1	2.6

(1) Includes classified hotels, non classified hotels, holiday villages, and guest houses

(2) Hotels only.

(3) 1998 data includes also unclassified tourist accommodation, appart-hotels and suites, and motels.

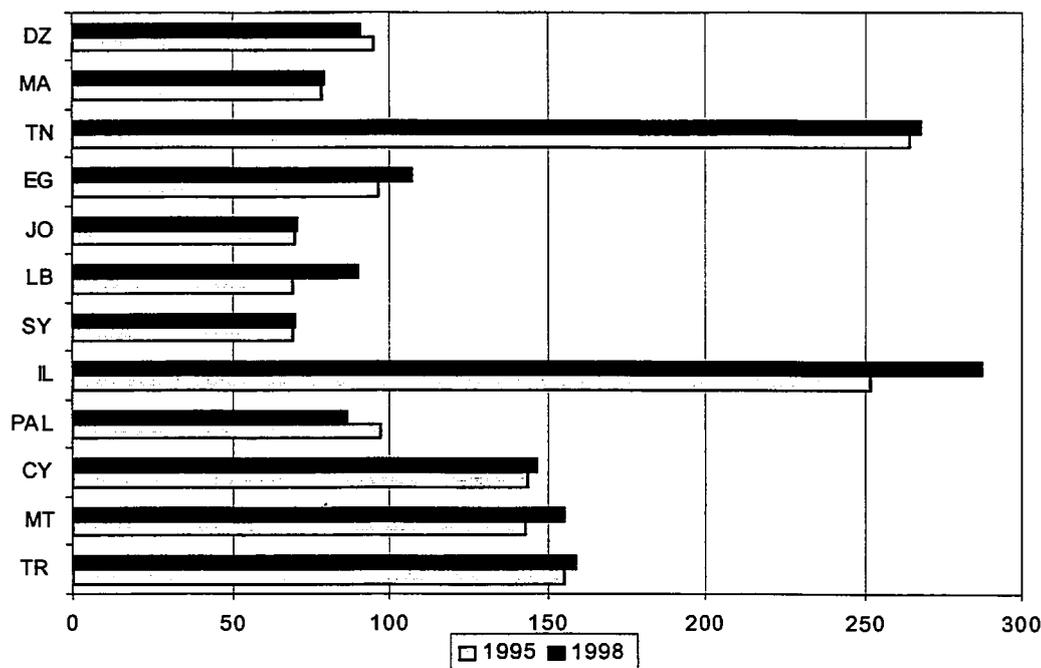
(4) 1997 data for 1998.

(5) at end of year

(6) Includes hotels, complexes, guest houses and hostels.

Source: Eurostat.

**Graph 3.14 - Average size of hotels and similar establishments, 1995-1998**



Source: Eurostat.

With few exceptions, in 1998 almost all countries revealed an increase in the average size of hotels and similar establishments, with respect to 1995. Lebanon recorded the highest growth in percentage terms, showing an increase of +29.5%, representing

+20.5 beds per units. Israel registered the highest development in absolute values with +35.9 bed-places per unit (+14.3%). Decreases were recorded in Algeria (-4.4%) and in Palestine (-10.8%).



### Technical Note

The data used in this publication are mainly extracted from the Eurostat information system on tourism "TOUR" (available in Eurostat reference data base New Cronos). The data collection on tourism at European level is based on Council Directive 95/57/EC, adopted 23 November 1995. The Directive provides a basic set of variables on tourism supply and demand, for which European Union Member states are collecting data on a regular basis. Data are collected on a monthly, quarterly and annual periodicity. Methodological recommendations and definitions used by the countries are based on the Community Methodology on Tourism Statistics (Eurostat, 1998, ISBN 92-828-1921-38). By having a common basis in Europe for data collection, definition of variables and exchange of good practices, the Directive provides users with comparable and harmonised statistics on tourism.

The terminology specific to tourism used in this publication is fully in line with the definitions developed by Eurostat in the Community Methodology on Tourism Statistics.

Other Eurostat data sources used in this publication are Balance of Payments, Labour Force surveys and Business statistics (available in Eurostat reference data base New Cronos). Population figures refer to 1 Jan. 1997.

: = not available

EU share of nights spent by non-residents: Share of non-resident tourists originating from other EU countries in relation to the world total.

Registered tourist accommodation comprises in this publication hotels and similar establishments and other collective accommodation establishments. The latter includes holiday dwellings, tourist campsites and other collective accommodation, e.g. youth hostels and group accommodation.

Travel ratio: The ratio between credits and debits in the travel item of the Balance of Payments. A ratio higher than 1 indicates that the country is a net exporter of tourism (receipts are greater than expenditures) and a ratio less than 1 means the country is a net importer of tourism (receipts are lower than expenditure).

Detailed notes to table 3.5 on page 45 (number of other collective accommodation and their bed-places): Due to changes in methodology occurred in several countries and to the lack of information for some types of collective accommodation in some years, sometimes variations reported in table 3.5 refer to a different period than 1995-1998. Please, read carefully the following notes.

*EU-15* - Establishments: comparison excludes Ireland. Bed-places: comparison excludes Ireland and the United Kingdom.

*EUR-11* - Comparisons exclude Ireland.

*Denmark* - 1995 data for holiday dwellings and other collective accommodation n.e.c. refer to 1996.

*Germany* - Change in methodology in 1996. Comparison refers to % changes 98/96.

*Greece and Spain* - Only tourist campsites.

*France* - 1995 data for holiday dwellings and other collective accommodation n.e.c. refer to 1996. Bed-places: change in methodology for other collective accommodation n.e.c. in 1996. Comparison refers to % changes 98/96.

*Ireland* - 1998 data on establishments refers to 1997. Change in methodology in 1997. Data are not comparable.

*Italy* - Bed-places: 1998 data refer to 1997; change in methodology for holiday dwellings in 1996. Comparisons express % changes 98/96.

*The Netherlands* - 1998 data refer to 1997.

*Austria* - Change in methodology in 1998. Comparisons express % changes 97/95.

*Portugal* - Excluding holiday dwellings. For tourist campsites 1998 data refers to 1997.

*The United Kingdom* - Bed-places: change in methodology in 1997.

*Island* - Establishments: break in the time series in 1996. Comparison refers to % changes 98/96. Bed-places: only holiday dwellings.

*Liechtenstein* - Excluding tourist campsites.

*Norway* - For 1995 only tourist campsites.

*Switzerland* - Only tourist campsites and other collective accommodation n.e.c.

### **Terms and definitions**

**TOURISM:** The activities of persons travelling to and staying in places outside their usual environment for not more than on consecutive year for leisure, business and other purposes.

Domestic tourism<sup>1</sup> comprises the activities of residents of a given area travelling only within that area, but outside their usual environment.

Inbound tourism as comprises the activities of non-residents travelling in a given area that is outside their usual environment.

Outbound tourism comprises the activities of residents of a given area travelling to and staying in places outside that area (and outside their usual environment).

Internal tourism comprises domestic and inbound tourism.

National tourism comprises domestic and outbound tourism.

International tourism comprises inbound and outbound tourism.

VISITORS: Persons travelling to a place other than that of his/her usual environment for less than twelve consecutive months and whose main purpose of travel is other than the exercise of an activity remunerated from within the place visited.

TOURISTS: Overnight visitors.

INTERNATIONAL TOURISTS: International visitor who stays at least one night in collective or private accommodation in the country visited.

TOURIST ACCOMMODATION: Any facility that regularly or occasionally provides overnight accommodation for visitors.

COLLECTIVE ACCOMMODATION ESTABLISHMENTS: Establishments which provide overnight lodging for the traveller in a room or some other unit. The number of places it provides must be greater than a specified minimum amount 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: Collective accommodation establishments typified as being arranged in rooms, in numbers exceeding a specified minimum, and as providing certain services including room service, daily bed-making and cleaning of sanitary facilities.

OTHER COLLECTIVE ACCOMMODATION AND SPECIALISED ESTABLISHMENTS: The remaining types of tourist accommodation belonging to the division of collective

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<sup>1</sup> The term "Domestic" in the tourism context differs from its use in the System of National Accounts. In the national accounts context it refers to activities and expenditures of both residents and non-residents travelling within the given area, which in tourism terms is domestic and inbound tourism.

accommodation establishments. Such establishments are intended for tourists, may be non-profit making, coming under a common management, providing minimum common services (not including daily bed-making), and not necessarily being arranged rooms but perhaps in dwelling-type units, campsites or collective dormitories and often engaging in some activity besides the provision of accommodation, such as health care, social welfare or transport.

**PRIVATE TOURIST ACCOMMODATION:** Private tourist accommodation provides, for rent or without charge, a limited number of places. Each accommodation unit (room, dwelling) is independent and is occupied by tourists, usually by week or weekend, fortnight or month, or by its owners as a second or holiday home.

**ESTABLISHMENT (LOCAL UNIT):** The local unit is an enterprise or part thereof situated in a geographically identified place. At or from this place economic activity is carried out for which - save for certain exceptions - one or more persons work (even if only part-time) for one and the same enterprise.

**BEDPLACE:** The number of bedplaces 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. The term bed-place applies to a single bed, double bed being counted as two bed-places. The unit serves to measure the capacity of any type of accommodation. A bed-place is also a place on a pitch or in a boat on a mooring to accommodate one person.

**ARRIVAL:** A person who arrives at a collective accommodation establishment or at private tourism accommodation and checks in. No age limit is applied: children are counted as well as adults, even in the case when the overnight stays of children might be free of charge. Arrivals are registered by country of residence of the guest and by month. The arrivals of non-tourists (e.g. refugees) are included. The arrivals of same-day visitors spending only a few hours during the day at the establishment are excluded from accommodation statistics.

**NIGHTS SPENT (OVERNIGHT STAY):** Each night a guest actually spends or is registered (his/her physical presence there being unnecessary) in a collective accommodation establishment or in private tourist accommodation. Overnight stays are calculated by country of residence of the guest and by month. Normally the date of arrival is different from the date of departure but persons arriving after midnight and leaving on the same day are included in overnight stays. A person should not be registered in two accommodation at the same time. The overnight stays of non-tourists (e.g. refugees) should be excluded, if possible.

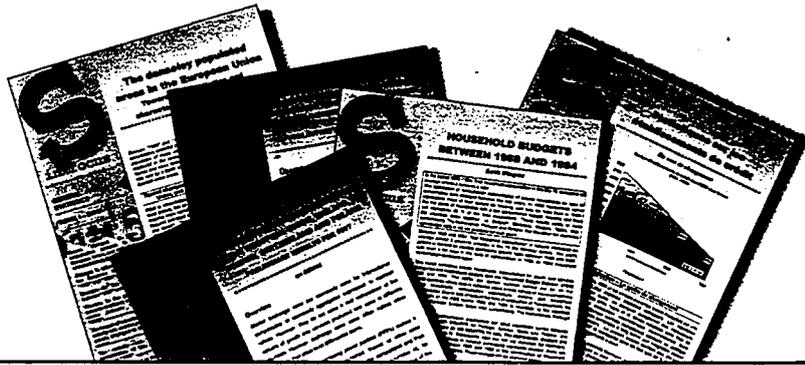
**NET RATE OF UTILISATION OF BEDPLACES:** The net occupancy rate of bedplaces in one month is obtained by dividing total overnight stays by the product of the bedplaces on offer and the number of days when the bedplaces are actually available for use (net of seasonal closures and other temporary closures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

Formula:  $NORB = (P/Gd) \times 100$

where P is the number of registered overnight stays during the month (year) and Gd is the number of bed-days actually available for use during the month (year).

**INTERNATIONAL TOURISM RECEIPTS AND EXPENDITURES:** Balance of Payments data are in line with the definitions of the International Monetary Fund. The Balance of Payments is defined as the record of a country's international transactions with the rest of the world (or, in other words, transactions of its residents with non-residents). Data in this publication focuses on transactions concerning the Travel item. Travel covers goods and services acquired from an economy by non-resident travellers during their stay on the territory of that economy and for their own use. It excludes receipts and expenditures for international transport.





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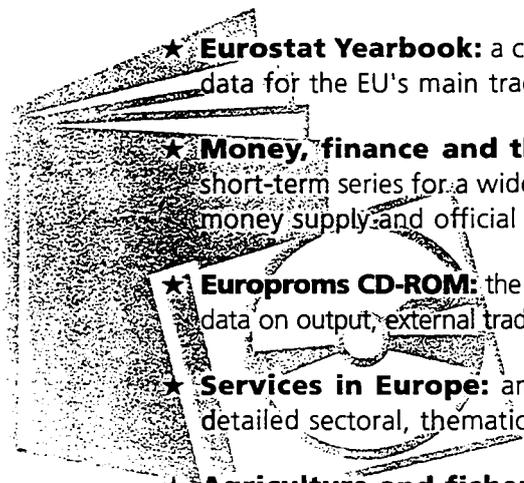
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