Tourism in times of crisis

The European Commission published the European tourism strategy in June 2010. Coming in the wake of the financial and economic crisis, its aim was to maintain Europe as the world’s top tourist destination. The strategy proposed, among other initiatives to extend tourism seasons, diversify the offer and improve the professional skills of the tourism workforce.

Furthermore, the World Tourism Organisation announced on 13 December that, for the first time, the milestone of one billion tourists in a year has been reached.

This document looks at the specific characteristics of tourism employment and at spending on tourism as important drivers of economic growth. Regional tourist arrivals and divergences in the type of establishments most visited in each Member State are also shown.

Finally, evolution in business trips and their spending during the crisis’ peak, and changes in the number of overnight stays at regional level, are presented.
Library statistical spotlight

Tourism in times of crisis

2. Seasonality of tourism employment

Data source: Eurostat

Tourism employment seasonality: Average quarterly change
2009-2012

UK          SL          SK          SE          RO          PT          PL          NL          MT          LV          LU          LT          IT          IE          HU          GR          FR          FI          ES          EE          DK          DE          CZ          CY          BG          BE          AT

-30%        -20%        -10%        0%         10%         20%         30%  1st Quarter  2nd Quarter  3rd Quarter  4th Quarter

3. Tourism and GDP

Data source: Eurostat

In 2008 average spending on tourism across the EU was slightly higher than in 2011, at roughly €19 billion, €3.8 billion being spent on business trips.

Average spending for 2010 on domestic tourism, €9.5 billion, was slightly higher than spending on trips abroad at around €9.3 billion.

Evolution of labour market between January 2008 and June 2012

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Author: Eulalia Claros
Contact: eulalia.claros@ep.europa.eu
4. Tourism and business

Evolution of the share of business trips in total trips

Evolution in the share of spending on business trips abroad

On average 60% of EU citizens spend their holiday trips within their country of residence.

5. Tourist arrivals in 2010 (in thousands)

Data source: Eurostat

Author: Eulalia Claros
Contact: eulalia.claros@ep.europa.eu
6. Tourism demand

Data source: Eurostat (tour_occ_nin2, tour_dem_tn, tour_occ_arnraw)

Change in the number of tourist arrivals:
2011 relative to 2008

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40% of tourism nights spent by EU citizens abroad were outside the EU, whilst almost one third of tourists arriving in the EU in 2010 came from the rest of the world.

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Further information

1. Tourism employment as part of the total workforce - June 2012

The map shows the share of employment in tourism, which includes persons employed in accommodation and food service activities. Seniority in the tourism sector is shown in the small pie chart for each Member State (MS): the percentage of persons employed who have spent less than two years in their current job.

The bar chart shows the EU average participation of women in different sectors of tourism compared to the share of women in the total workforce.

2. Tourism employment seasonality

Seasonality of employment: quarterly change over the previous quarter has been averaged over the period January 2008 - June 2012 to present the dynamics of the national tourism-related labour markets.

Employment in the tourism sector tends to pick up during the spring and summer with a marked decrease in activity during the cold season. However, in some countries employment figures tend to change less than in others throughout the year, while in a few countries tourists favour colder months.

The lines show the evolution of national labour markets from the 1st quarter of 2008 till the 2nd quarter 2012.

3. Impact of tourism on EU GDP

The direct contribution of Travel and Tourism to EU GDP for 2011 is estimated by the World Travel & Tourism Council at 2.9%. According to the methodology established by the 2008 Tourism Satellite Account this includes industries that deal directly with tourists and is calculated to be consistent with the output recorded by the National Accounts of tourism-related sectors, such as accommodation and food services, air transport, travel agents and tour operators.

“Tourism spending” accounts for the total consumption expenditure by or on behalf of a visitor for and during their trip and stay at the destination. Domestic trips are those within the tourist ‘s country of residence, while outbound trips are trips abroad.

Three graphs are presented to illustrate the impact of tourism on EU gross domestic product:

a) a time series presenting the evolution of total and tourism-generated gross value added during period 2001-2011.

b) a time series presenting the evolution of total consumption expenditure by European households along with the evolution of spending devoted to tourism during period 2001-2011.

c) spending for business and holiday trips and domestic and outbound trips as a proportion of 2010 spending on tourism.

In 2008 average spending in tourism across the EU was slightly higher than in 2011 at roughly €19 billion, out of which €3.8 billion was spent on business trips.

The average for spending on domestic tourism, €9.5billion was slightly higher than spending on trips abroad, at around €9.3 billion.

The Netherlands does not report figures on business trips and 2008 spending data for Malta and Portugal is not available. Furthermore 2010 data on domestic spending for Malta and Cyprus is not available. This sparse availability of spending data explains the difference in totals.
4. Tourism and business

- Evolution of the part of business trips in total tourist trips (2008-2011)
- Evolution of the spending on outbound business trips in all outbound tourist trips (2008-2011)

The EU share of business trips among total trips decreased from 24 to 21% of all trips between 2008 and 2011, with the average number of business trips per country falling from some 6.9 million trips in 2008 to little more than 5.6 million in 2011. The average spending on business trips has remained stable at roughly €1100 once the inflation effect is taken into account. Moreover, the EU average of leisure trips declined from 36.8 million in 2008 to 34.2 million in 2010.

The Netherlands does not report figures on business trips and figures for number of trips in Malta, Cyprus 2009, Ireland 2010, 2011 and Greece and Italy 2011 are not available. Spending data for Portugal and Malta 2008, Cyprus 2009, Greece and Italy 2011, are not available.

5. Tourist arrivals in 2010 (in thousands)

The map presents the number of persons that checked in and out of a collective accommodation establishment. Stays in private accommodation are not included as they are not covered by the EU Directive on tourism statistics.

Luxembourg is represented by 2009 data. Ireland only provides data on Irish residents.

6. Tourism destinations

The chart on overnight stays by type of accommodation (2011) shows that tourists in the EU tend to prefer staying in hotels, although occupancy in other types of collective accommodation establishments (holiday dwellings, youth hostels, tourist dormitories and other establishments providing accommodation for groups) can be as high as almost 60% of all overnight stays in Denmark.

European tourists spent 938 million nights outside the EU. The chart demonstrates their destination by continents.

The second pie chart shows from where the 77 million non-European tourists who arrived in EU accommodation establishments during 2010 came. The map shows the relative change in the number of persons arriving in tourist accommodation establishments during the crisis period, by NUTS II regions. For Greece, the Netherlands, Poland and the UK the comparison is between 2010 and 2008. For the Italian regions of Centro and Nord-Est it is between 2011 and 2010, for Luxembourg 2009 and 2008. Ireland provides data on residents only.

Notes

**Country code:** Austria (AT), Belgium (BE), Bulgaria (BG), Cyprus (CY), Czech Republic (CZ), Denmark (DK), Estonia (EE), Finland (FI), France (FR), Germany (DE), Greece (GR), Hungary (HU), Ireland (IE), Italy (IT), Latvia (LV), Lithuania (LT), Luxembourg (LU), Malta (MT), Netherlands (NL), Poland (PL), Portugal (PT), Romania (RO), Slovakia (SK), Slovenia (SI), Spain (ES), Sweden (SE), United Kingdom (UK), European Union (EU27).

**Extraction date:** data has been extracted on 3 December 2012.