14.- Intensity of tourism

Key message

- At EU level, the number of overnight stays in tourist accommodation in the coastal regions (NUTS 2) of coastal member states exceeds that of their hinterland.

- In spite of the importance of tourism to many coastal economies, systematically collected and reliable data on the intensity of tourism is not available at the appropriate scale (local level) to allow analysis relevant for the coastal zone.

Summertime tourism peak at the bank in Ostend, Belgium ©Westtoer-Daniël de Kievit

Why monitor intensity of tourism?

Tourism is today one of the main sources of income and employment for a significant proportion of the coastal population in Europe's coastal areas. That applies to either foreign or domestic tourism, concentrated in summer peak seasons or spread over the year.
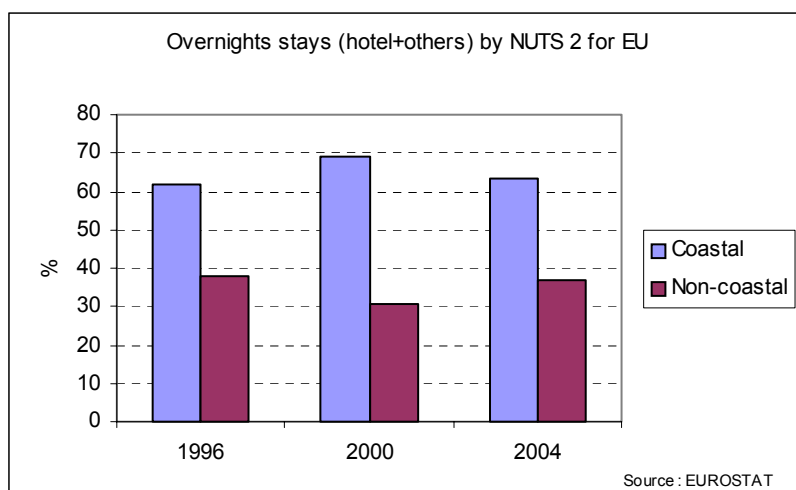
Tourism is - at its most elemental - about numbers: numbers of visitors, numbers of flights, number of hotels, restaurants, clubs and cafes, and the impact of those numbers in terms of the use of energy and resources, waste and litter, decline in cultural and ecological diversity, as well as in terms of the creation of jobs, income, opportunities and social inclusion. Measuring the intensity of tourism provides a step towards the assessment of the relative weight of all those numbers and, therefore, of the relative benefits of tourism itself. However, we simply want to know whether the volume of tourism at the coast is increasing, stable or decreasing over time, what is the ratio of domestic to foreign visitors, whether there is a difference in volume between peak periods and "off" season and whether efforts to achieve a better 'spread' over seasons are having an effect on the occupancy rates of bed places in tourist accommodation.

This indicator belongs to the set of 5 indicators that monitor progress towards achieving the third goal for coastal sustainability set out in the EU Recommendation concerning the implementation of ICZM - to promote and support a dynamic and sustainable coastal economy.

The indicator has two measurements: the number of overnight stays in tourist accommodation and the occupancy rate of bed places.

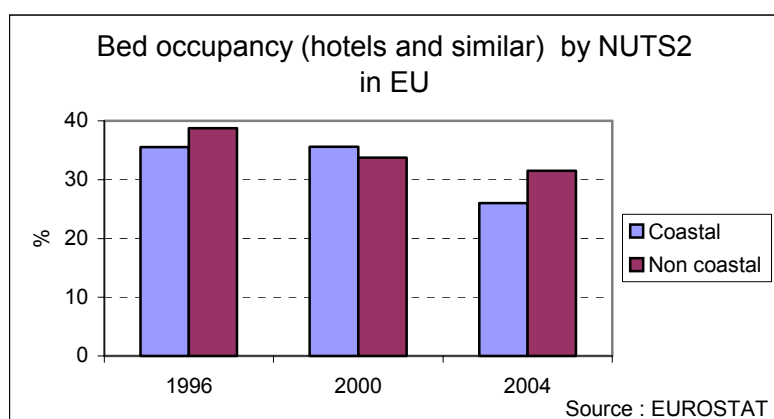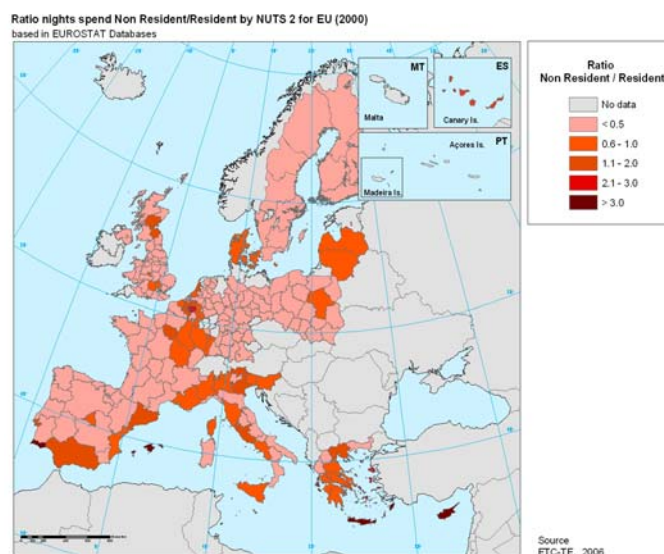## What does the indicator show from European to local level?

Coastal regions in Europe (NUTS 2 level) account for more than 60% of the overnight stays (OSs) in hotels and serviced accommodation in the EU. However, for the purposes of sustainability analysis, data needs to be collected at a very local level (coastal municipalities or NUTS 5). Even with these limitations in the appropriateness of scale (NUTS 2) to analyse and visualise the coast, the percentage of OSs in coastal NUTS 2 is higher than in the hinterland.

Overnights stays (hotel+others) by NUTS 2 for EU

Source : EUROSTAT

For the given years (1996, 2000 and 2004), the proportion of overnight stays in tourist accommodation in EU coastal NUTS 2 fluctuates between 60% and 70% of the national totals of coastal member states. The graph illustrates the importance of European coastal regions (NUTS 2) as a tourism and holiday destination, compared to the hinterland.
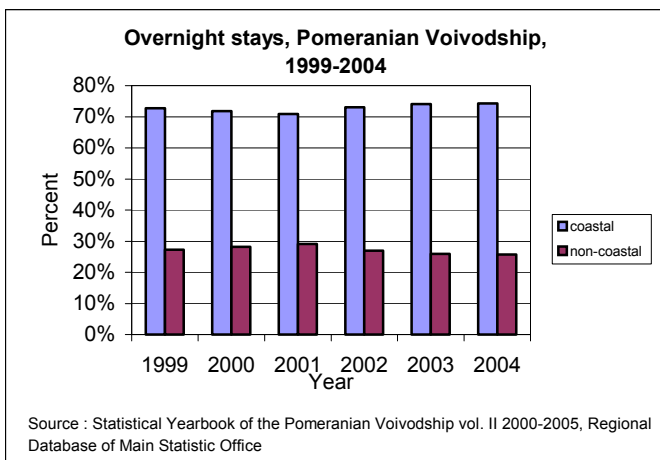
If we take the origin of the tourist into account (resident or non- resident), the days spent in hotels and similar establishments is on average higher for the resident category.

The map shows the ratio of overnight stays of non-residents compared to the number of OSs by residents. This ratio is particularly high for the Mediterranean (south and east of Spain, Italy, south of France, Balearic Islands) and Greece and the Turkish islands. The coastal zones of West-Flanders and North Holland are also traditional destinations for non-resident tourism.

Ratio nights spend Non Resident/Resident by NUTS 2 for EU (2000)
based in EUROSTAT Databases

Ratio
Non Resident / Resident

No data
< 0.5
0.6 - 1.0
1.1 - 2.0
2.1 - 3.0
> 3.0

Source
ETC-TE, 2006

Bed occupancy (hotels and similar) by NUTS2 in EU
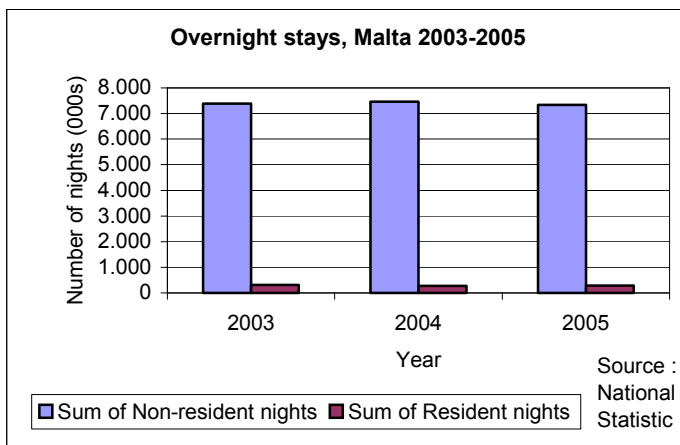
Source : EUROSTAT

No trend can be detected in the data of occupancy rate (OR) at NUTS 2. There are regions in Europe with a high accommodation density due to the high number of bed places available. In contrast, other regions have a high accommodation density due to their small populations. Several classic destinations for package-holiday flights, such as The Balearic Islands in Spain and the Algarve in Portugal, have a very high accommodation capacity. The differences between the coastal and non-coastal regions are not so explicit as the number of overnight stays.

Wherever data is available at an appropriate level, it provides valuable insights regarding the nature of tourism. In the **region of Pomerania (Poland)** more than 70% of the overnight stays are spen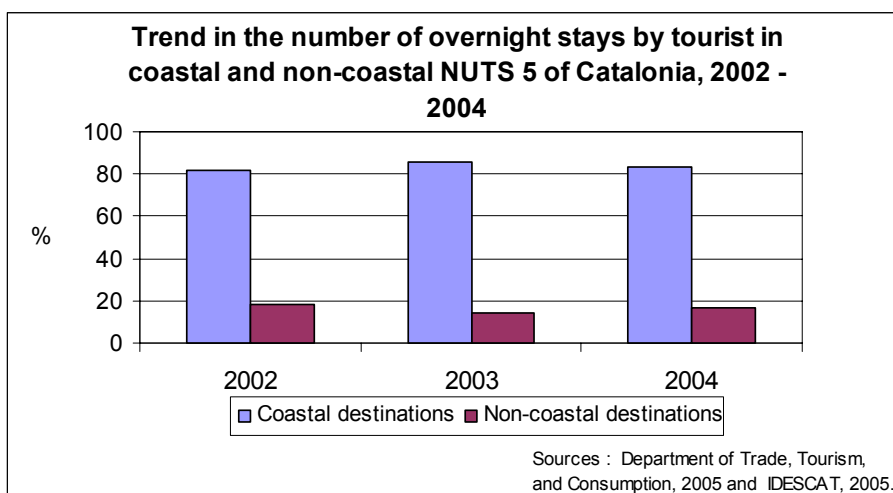t in tourist accommodation in coastal municipalities. On the other hand, it is mainly **'domestic' tourism**: 9 out of each 10 overnight stays are spent by tourists from within the country.

Overnight stays, Pomeranian Voivodship, 1999-2004

Source : Statistical Yearbook of the Pomeranian Voivodship vol. II 2000-2005, Regional Database of Main Statistic Office

Tourism in **Malta** is characterised by **foreign arrivals and stays** (approximately 7 million nights p.a.) and a considerable amount of investment in larger hotels that are mainly concentrated at the coast. Tourism remains a seasonal business, with large variations in sources of employment and demands for energy and scarce natural resources such as water.

To address these problems, development plans for coastal tourism often aim to achieve a better spread over the year. Although targets have been set concerning the occupancy rates of bed places for such accommodation, no data is available at the local level to measure occupancy rates in coastal municipalities.

Overnight stays, Malta 2003-2005

Source : National Statistic

Trend in the number of overnight stays by tourist in coastal and non-coastal NUTS 5 of Catalonia, 2002 - 2004

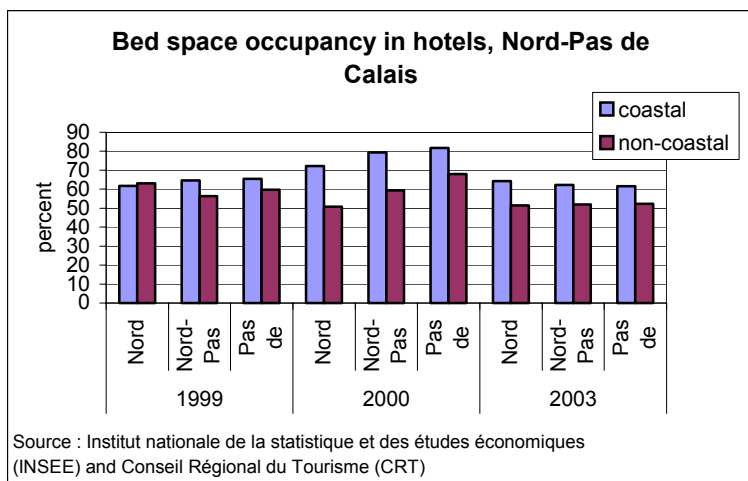Sources : Department of Trade, Tourism, and Consumption, 2005 and IDESCAT, 2005.

Data on OSs in **Cataluña** is only available at a sub-regional level - the numbers for coastal and non-coastal figures have been estimated by weighting the number of bed places at municipality level. The results only provide an approximation of the effective number of OSs. Interestingly, even for coastal regions that have been major tourist attractions for decades, this basic data is not directly available and has to be estimated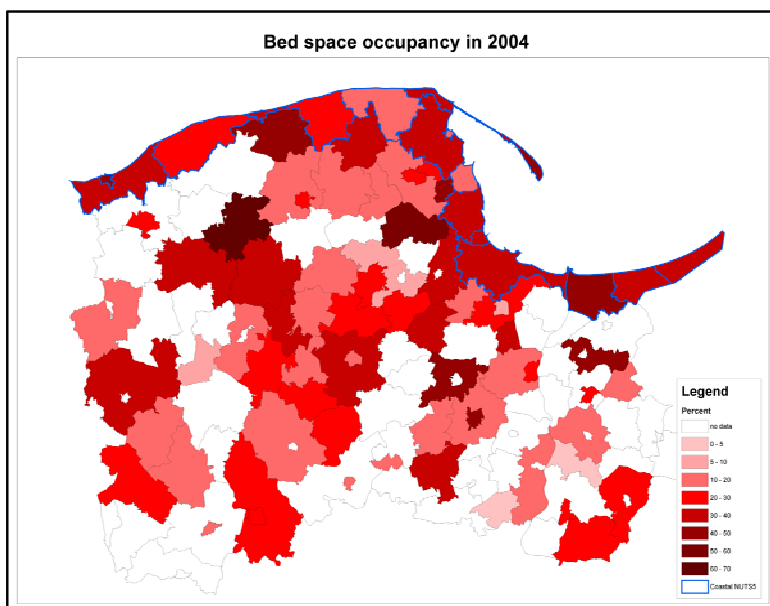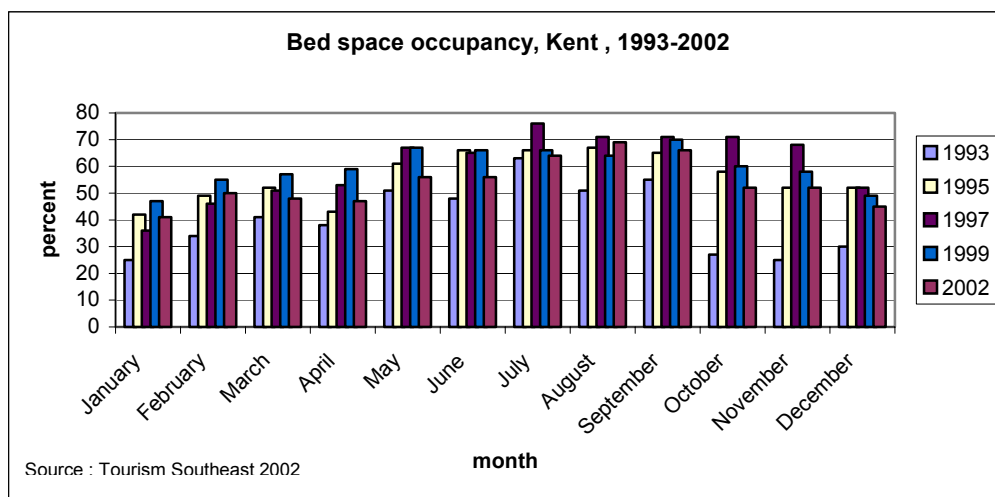 from regional information (based on the proportional availability of bed places in coastal and non-coastal municipalities). The number of nights spent by foreigners is decreasing while the number of OSs of domestic tourists (non-resident Spanish) is increasing.

In the **southern North Sea** coastal region, data on the occupancy rate of bed places in tourist accommodation is only available for the tourist zones and by accommodation type, in the Nord-Pas de Calais region. Tourist zones represent groups of coastal communities divided into the 'Dunkerque" and "Calais" coastlines. Occupancy of bed places at the Côte d'Opale is on average 10% higher than in the hinterland. Substantial seasonality is observed in the occupancy (%) of bed places. For West-Vlaanderen, data is not collected.

Bed space occupancy in hotels, Nord-Pas de Calais

Source : Institut nationale de la statistique et des études économiques (INSEE) and Conseil Régional du Tourisme (CRT)

Data on occupancy rates and trends in OR over the season, are generally available at the province or sub-national level only, not allowing conclusions to be drawn for the coastal zone. An example is included for the region of **Kent** (UK) where peaks are observed around the months of July and August.

Bed space occupancy, Kent , 1993-2002

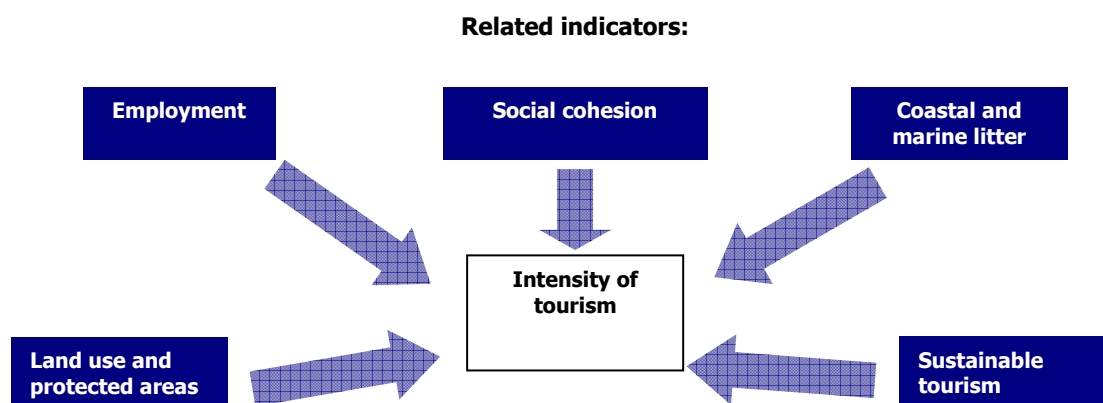Source : Tourism Southeast 2002

Bed space occupancy in 2004

Since 2001, a decrease in the degree of bed space utilisation is observed in the **region of Pomerania**. This decreasing trend is higher in coastal communes (4.1%) than in the rest of the communes of the Pomeranian Voivodship (2.1%).

The occupancy rate of bed places in coastal communes is higher (by 9.4%) than in the rest of the municipalities of Pomerania. The nature of tourism has its effects on the social development and carrying capacity of the 'hosting' community.

Source: Statistical Yearbook of the Pomeranian Voivodship vol. II 2000-2005, Regional Database of Main Statistic Office

What are the implications for planning and managing the coastal zone?

The number of overnight stays spent by tourists gives an indication of the economic importance of tourism, while it also provides a measure of the pressure that tourism exerts on the environment (local infrastructure, land use, fragmentation and habitat loss, water quality, use of natural resources and others). Peak-season concentrations of visitors in coastal towns can generate a heavy impact on the environment if not properly managed. The consumption of water and energy and the problems of wastewater and waste disposal during peak seasons require additional planning and infrastructure. The maintenance of hotels and tourist accommodation requires energy, regardless of the efficiency in occupation of bed places. Knowledge of seasonal data is of great importance, so that the spreading of the number of overnight stays within one year can be analyzed[1]. Sectoral development and regeneration plans aim at increasing the local benefits of tourism, creating stable sources of employment and income for those living and working at the coast, for example by promoting a more equal spread over the year or by taking advantage of the available resources and attractions to target a specific segment of the market. Knowledge of the volume of tourism and its impact on the local environment and economy is an essential requirement in developing policies and managing tourism in local areas. Nevertheless, such information is not readily available. Tourism has no well-framed EU policy because Article 3 of the Maastricht Treaty gives the European Community limited scope to take forward non-legislative measures on tourism. However, the Council of the EU has outlined its vision, which also includes the aspect of sustainability on the future of European tourism in its resolution of 21 May 2002 (2002/C135/01).

Although it is difficult to set specific policy targets at the European level, in some cases local policy may set objectives for this indicator.

Related indicators:

Further work needed

- Some countries report tourist data in aggregated tourist area categories: "coastal (at the national level)", "city" and "small town and rural", which do not allow for local analysis. Data is needed at NUTS5 level, at least for the coast.

- In order to evaluate trends in the seasonal spread of tourist 'pressure', data on the number of overnight stays needs fine-tuning in terms of seasonal data such as monthly or from May-October and from November-April (or June-September and October-April).

- There should be consistency and clarity in the definition of 'tourist accommodation'. Ideally, an estimate for overnight stays in rented accommodation (houses and apartments) should be included in order to calculate 'real' tourist pressure.

'Tourist zones' are defined for the collection of data on tourism. Boundaries do not coincide with other statistical units and this causes a problem with the correlation between indicators. These 'tourist' zones sometimes include 'the coastal zone'; however, the definition of boundaries is not always compatible with other statistical sampling. Therefore, data on the number of overnight stays also needs fine-tuning in terms of geographic area.

Data sources

Europe: EUROSTAT - 1996, 2000, 2004

Pomeranian Voivodship (1995-2004):

- EUROSTAT
- Statistical Yearbook of the Pomeranian Voivodship vol. II 2000-2005
- Regional Database of Main Statistic Office

Malta: Accomstat survey of the National Statistics Office - 2003, 2004, 2005

Catalonia:

- Department of Trade and Tourism of the Generalitat of Catalonia - 2002-2003
- Tourism General Direction - 2002-2004

West-Flanders (and local network of partners):

- Nord-Pas de Calais: Institut national de la statistique et des études économqiues (INSEE), Conseil Régional du Tourisme (CRT) - 1999, 2000, 2003
- Kent: Kent Tourism Facts, Kent County Council - 1993-2002

Reliability of the indicator

The definition of 'tourist accommodation' is not yet optimal and needs reconsideration. In some cases, second homes and rented accommodation is included. In some of the local surveys, the overnight stays spent at the homes of relatives and friends (and even on yachts and in marinas) are also included. Other establishments for overnight stays should be included. The seasonal data should also be taken into account, because this can give a totally different outcome in the evaluation of this measurement. Some data is not accessible, of insufficient quality or missing at NUTS5 level to allow for the proper analysis on a spatial and temporal scale. Consistency is also often lacking. Occupancy rates may be reported as per bed or per bedroom (various and unknown number of bed places).

References

(1) EU Green Paper on Maritime Policy: Towards a future Maritime Policy for the Union: A European vision for the oceans and the seas". COM(2006)275 final.

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