

EVOLUTION OF FOREIGN TOURISTS NUMBER IN THE EUROPEAN UNION MEMBER STATES

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Abstract:

Tourism became one of the most important economic fields and it experienced significant increases all over the world. In the EU it is also a very important economic sector and five of the EU Member States are in the top ten destinations of the world. In this article we analyze the evolution of arrivals and nights spent of the foreign tourists and total tourists, as well as the occupancy rates of accommodation capacities in the EU countries. All the indicators analyzed have increasing trends and there are high differences among the EU Member States in terms of total number of arrivals, nights spent and occupancy rate. The share of foreign tourists in total arrivals and nights spent number differs quite much from country to country in the EU. Not all the Eastern and Central European countries managed to attract foreign tourists in the same degree after the EU accession, but some of them used this opportunity and, as a result, intensified their tourism activity. However, the most visited areas remain the ones from Southern Europe.

Key words: tourism, European Union, arrivals, nights spent, occupancy rate of accommodation capacity

JEL classification: L83

INTRODUCTION

In the last decades the tourism registered a considerable growth in all the regions of the world. The number of foreign visitors also increased significantly due to the development of technology and to the intensification of the possibilities of travelling (lower costs and less travel time). Some of the EU countries are among the main tourist destinations of the world. From the top ten destinations in the world, 5 are in the EU: France, Spain, Italy, UK, Germany, and the most visited areas are those in Southern and Mediterranean Europe.

European Union records 40% of international tourist arrivals worldwide, 31% of international tourism receipts and EU destinations welcomed half a billion international tourist arrivals in 2016 (UNWTO, 2018, p.15). Extra-EU source markets account for 137 million nights in EU accommodation establishments, most of them from the United States, Switzerland, the Russian Federation and China, and interregional source markets account for 276 million nights in EU establishments (UNWTO, 2018, p.49). In 2015, one in ten enterprises in the European non-financial business economy acted in tourism field, counting 2,4 million enterprises and an estimated number of 12,7 million persons; so, 9,2 % of the persons employed in the whole non-financial business economy and 21,7 % of persons employed in the services sector were in enterprises in industries with tourism related activities (Tourism Statistics – Statistics Explained). International arrivals in the EU are expected to grow 2,3% a year until 2020 and 1,5% a year until 2030, while international arrivals from markets outside the EU are expected to grow at a faster rate than from EU markets (UNWTO, 2018, p.63).

In this article we analyze the evolution of arrivals, nights spent and occupancy rates in the EU countries. We reveal the evolution and share of foreign tourists in the number of arrivals and nights spent. We use official statistical data from Eurostat and we elaborate appropriate graphs to highlight the trends of the indicators and the differences among the states. In all the figures showing several countries, these are ordered by the newest available statistical data, from the highest values to the smallest ones.

THE EVOLUTION OF TOTAL AND FOREIGN TOURISTS NUMBER OF ARRIVALS IN THE EUROPEAN UNION MEMBER STATES

The number of arrivals and nights spent depends on the size of the country, as well as on the touristic attractions of that country. As the EU enlarged, tourism experienced some changes also due to the freedom of movement of persons which facilitated the travels inside the EU. Together with the EU membership came the opportunity to attract tourists from older EU member states, of which not all the EU countries in the Eastern and Central Europe used to the same amount (Scutariu, 2016). We intend to see if after the first years after EU accession this situation changed or these differences are kept.

The number of *arrivals at tourist accommodation establishments* recorded growth in all the EU countries. We can notice that there are states where tourism arrivals increased significantly, while in other ones this number slowly increased. By far, the highest number of arrivals is in Germany, France, Spain, Italy and UK. The lowest number of arrivals corresponds to the smallest countries of EU: Luxemburg, Malta, Latvia, Cyprus, Lithuania and Estonia (Figure no. 1).

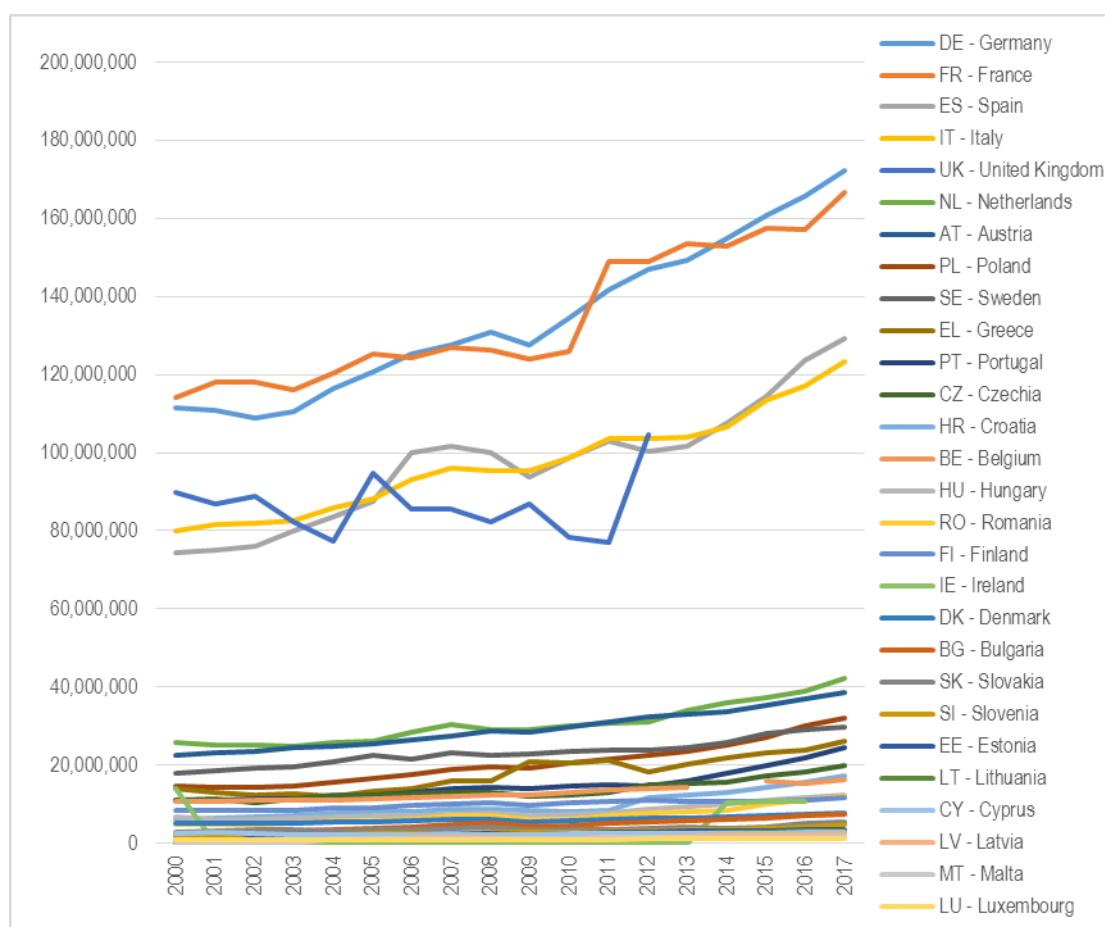


Figure no. 1. Arrivals at tourist accommodation establishments in the E.U. Member States, 2000-2017

Source: Eurostat (http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=tour_occ_arn2&lang=en)

The share of foreign tourist arrivals in total tourist arrivals differs very much from country to country, from approximately 90% to 21,26%, while the EU average is 39,77%. Also, the values are fluctuating in time and the general tendency is slow increase. We can see a decrease in the financial crisis period (2009-2010), followed by an increasing trend (Figure no. 2). So, the countries where the foreign tourist arrivals have the highest shares are: Malta, Luxemburg, Croatia, Cyprus, Slovenia, and the lowest shares are found in: Poland, Germany, Romania, Sweden and Finland. In

some cases, like Germany, this low share can be explained by the fact that residents travel very much in their own country.

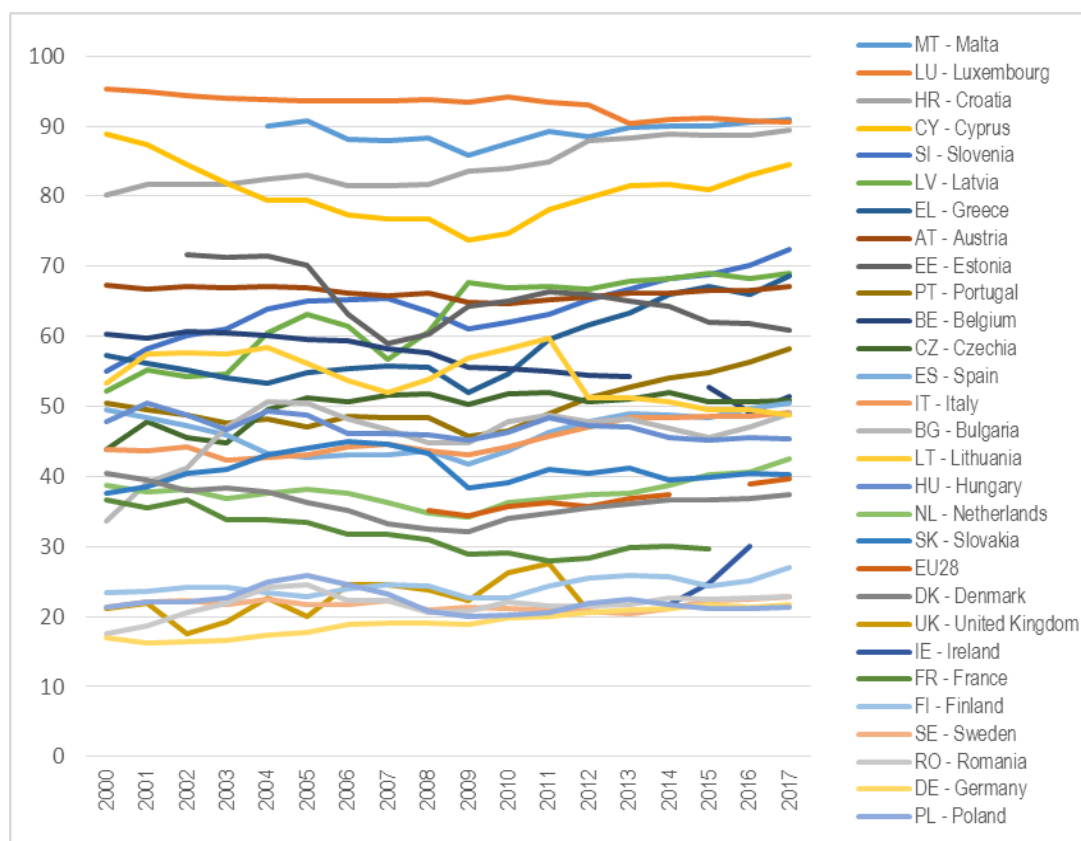


Figure no. 2. Arrivals from foreign countries share in total arrivals at tourist accommodation establishments in the E.U. Member States, 2000-2017 (%)

Source: Eurostat (http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=tour_occ_arr2&lang=en)

In the Annex, Table no. 1 we calculated the evolution indexes for arrivals – for total tourists and, respectively, for foreign ones. The main increases in the period 2000-2017 were registered in: Lithuania (increase of more than 5 times for total and foreign tourists arrivals), Latvia (increase of more than 4 times for total and of more than 5 times for foreign tourists arrivals), Bulgaria (increase of more than 3 times for total and of more than 4 times for foreign tourists arrivals), Croatia, Estonia, Slovenia, Romania, Poland (increase of more than 2 times for total and for foreign tourists arrivals). We can see that there are countries, including some of the Eastern and Central European ones, where the number of foreign tourists' arrivals increased higher than the total number of tourist arrivals. This means that the proportion of foreign tourists' arrivals increased in the total number of arrivals. Such significant increases are in Latvia, Bulgaria, UK, Romania and Slovenia.

THE EVOLUTION OF TOTAL AND FOREIGN TOURISTS NUMBER OF NIGHTS SPENT IN THE EUROPEAN UNION MEMBER STATES

Regarding the evolution of the *nights spent at tourist accommodation establishments*, we can notice a slowly increasing trend, only few countries experiencing high increases, some of the ones with the highest values (UK, Spain, France, Italy) (Figure no. 3.a). In this way the difference between these and the other EU countries increased. Generally, the lowest values are recorded in the EU smallest countries: Luxemburg, Latvia, Estonia, Lithuania and Malta.

The EU Member States are very different in terms of size and this fact gives some limits in the information got from the comparison of the values of nights spent. This inconvenient can be overcome by analyzing the intensity of tourism, highlighted by using the indicator *nights spent at tourist accommodation establishments expressed per thousand inhabitants*. This further information

revealed from Figure no. 3.b is that the highest tourism intensity is recorded in Malta, Croatia, Cyprus, Austria, Spain and Greece, these including areas from the Southern Europe, except Austria – visited for mountainous tourism. The lowest values are recorded in Romania, Poland, Latvia, Lithuania and Slovakia. The lowest values can also be the result of the short tourists’ stay that can be caused by the insufficient diversification of the tourist product.

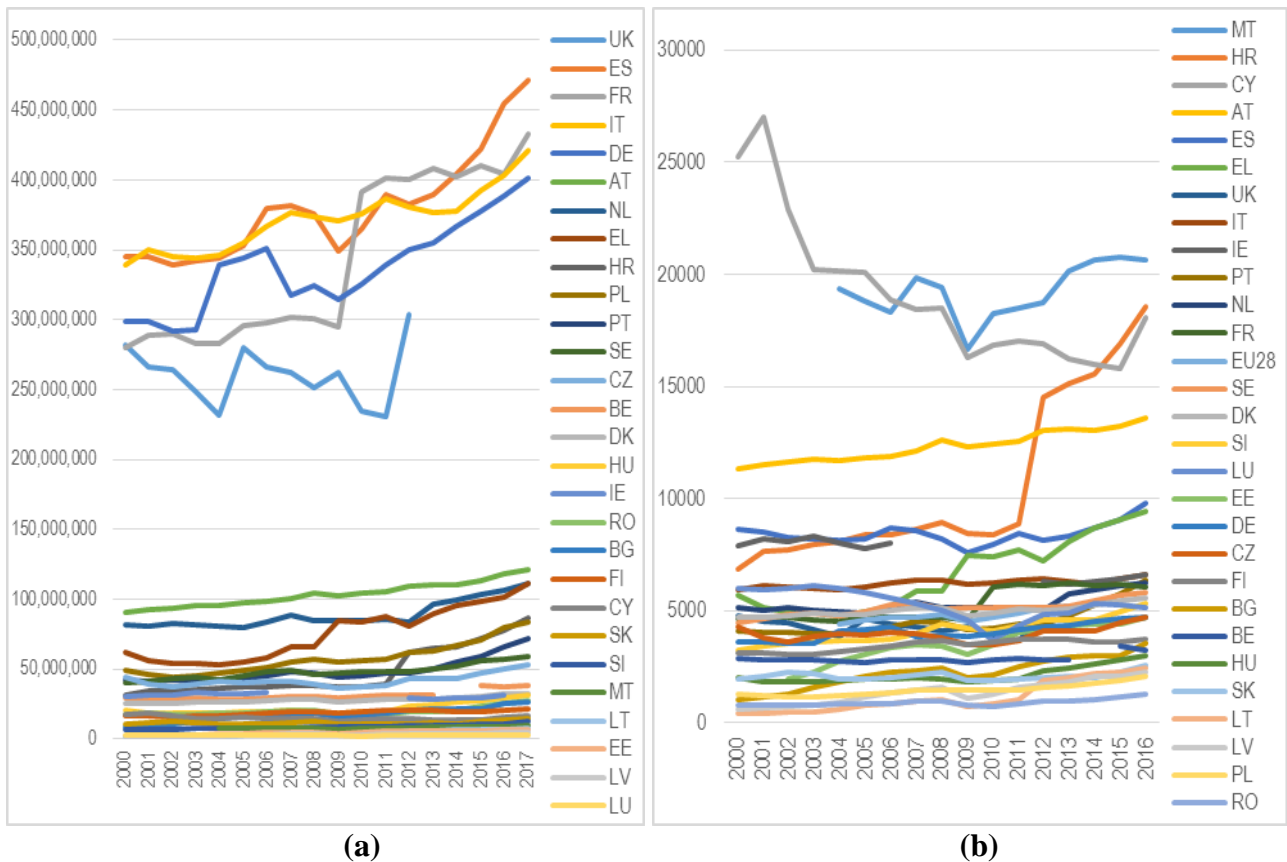


Figure no. 3. Nights spent at tourist accommodation establishments in the E.U. Member States, 2000-2017, (a): (number), (b): (per thousand inhabitants)

Source: Eurostat (http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=tour_occ_nin2&lang=en)

The share of foreign tourists nights spent in total nights spent is having a slowly increasing trend with fluctuations over time. The shares show high differences among the EU Member States, from 19,57% to 95,86% in 2017, and the EU average was 49,06%. The highest rates are found in Malta, Cyprus, Croatia, Luxemburg, Greece, and the lowest in Romania, Poland, Germany, Sweden and Finland (Figure no. 4). Some countries have a high number of residents that travel inside the country, so the foreigners share can be low, but other countries have difficulties in attracting foreign tourists.

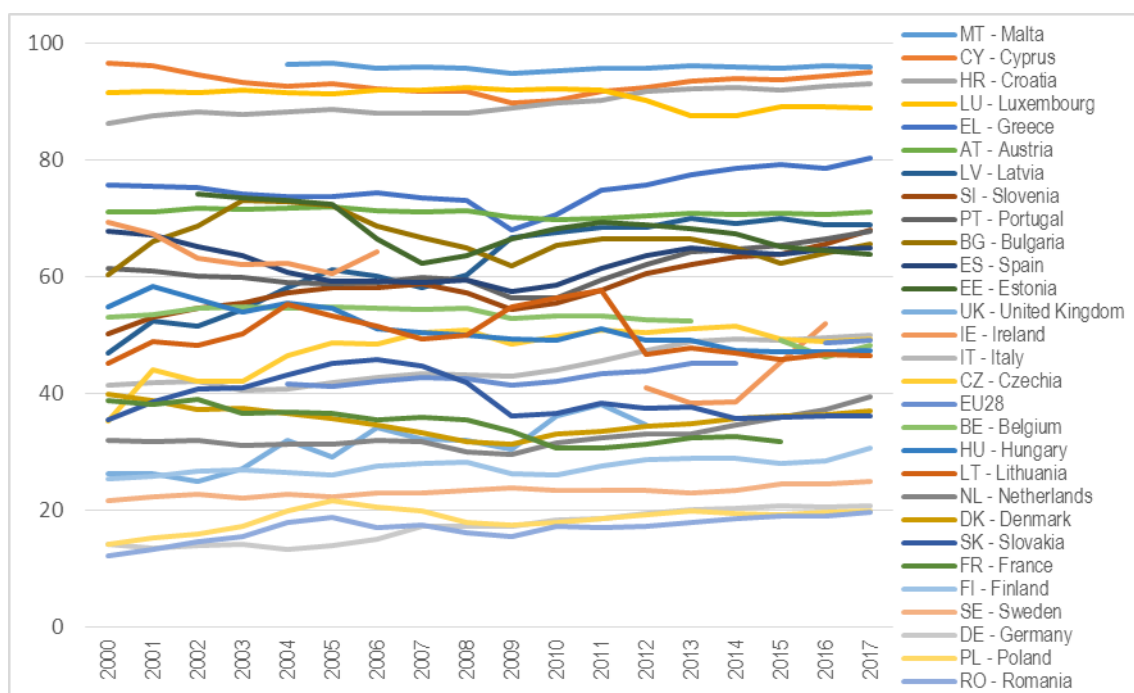


Figure no. 4. Nights spent at tourist accommodation establishments in the E.U. Member States: share of foreign countries in total, 2000-2017 (%)

Source: Eurostat (http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=tour_occ_nin2&lang=en)

The evolution indexes for 2000-2017 period for nights spent of total tourists and of foreign ones were calculated in the Annex, Table no. 2. The main increases were recorded in: Lithuania (increase of more than 5 times for total and for foreign tourists nights spent), Latvia (increase of more than 3 times for total and of more than 4 times for foreign tourists nights spent), Bulgaria (increase of more than 3 times for total and for foreign tourists nights spent), Croatia (increase of more than 2 times for total and of more than 3 times for foreign tourists nights spent), Estonia (increase of more than 2 times for total and for foreign tourists nights spent). In most of the countries the number of foreign tourists nights spent increased more than the total number of tourists nights spent, so the share of foreign tourists nights spent in total increased. The highest such increases were recorded in: Latvia, Poland, Romania, Slovenia and UK.

The evolution index for total nights spent at tourist accommodation (per thousand inhabitants) for the period 2000-2017 have a variety series of values. The most important increases were recorded in Lithuania (of 6 times), Latvia, Bulgaria (of more than 3 times), Croatia and Estonia (of more than 2 times) (Annex, Table no. 3). The EU growth average is 35%, and we notice that most of the Eastern and Central European countries of the EU have a growth higher than the EU average, which is a good thing as the tourism intensity in that zone was not so intense and there is much potential for development. Some of the main touristic destinations have slow growth of tourism intensity, which is a normal fact, taking into account the very high values of nights spent per thousand inhabitants.

THE EVOLUTION OF OCCUPANCY RATE OF ACCOMMODATION CAPACITY IN THE EUROPEAN UNION MEMBER STATES

The occupancy rate of accommodation capacity is also important, as it shows the efficiency of using those resources. So, the tendency in the EU Member States is of slow increase and the differences also tend to increase. The values are from 76,4% to 31,3% in 2017, while the EU average was 46,21%. The highest rates are recorded in Cyprus, Malta, Spain, Croatia, Ireland, and the lowest are in Luxemburg, Slovakia, Romania, Latvia, Poland and Hungary (Figure no. 5). This means that in these latest six countries either the accommodation capacity is oversized, or there are difficulties in attracting tourists.

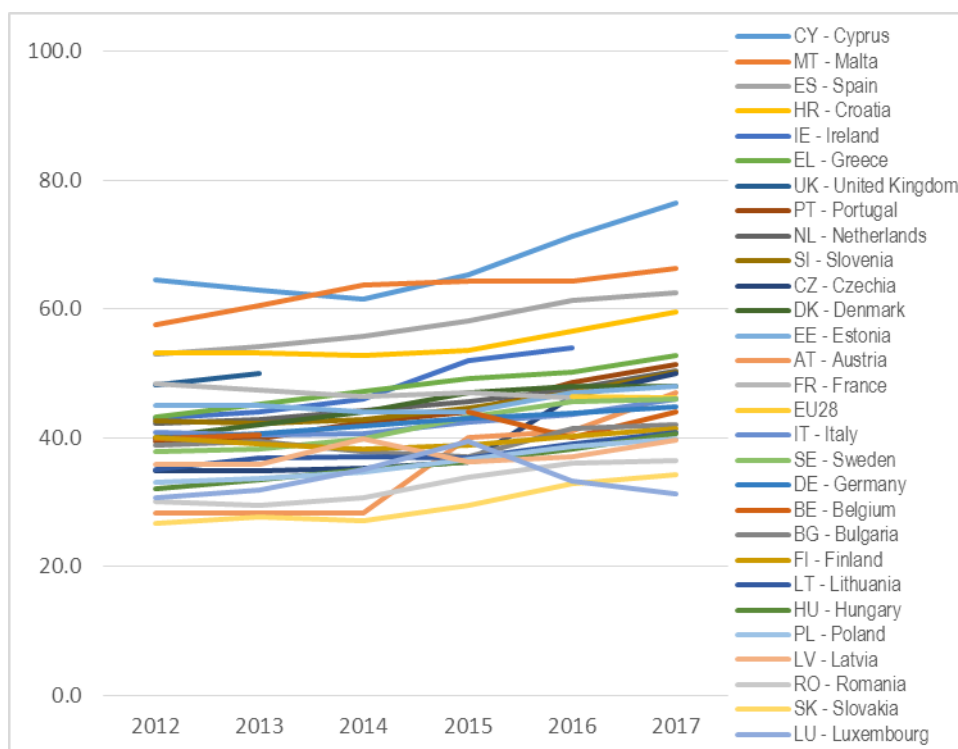


Figure no. 5. Net occupancy rate of bed-places and bedrooms in hotels and similar accommodation (bedplaces) in the E.U. Member States, 2000-2017

Source: Eurostat (http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=tour_occ_anor2&lang=en)

DISCUSSIONS AND CONCLUSIONS

Tourism recorded spectacular increases in the latest decades on all the continents. Europe has always been a preferred tourism destination. In the EU tourism was and remains one of the most important economic fields, especially in the Southern and Mediterranean zone.

As a result of our analysis, we noticed that the tourism activity evidenced by the number of arrivals and nights spent is concentrated in some countries: UK, Spain, France, Germany and Italy. Reported to the population of the country, the highest tourism intensity (nights spent per thousand inhabitants) is recorded in: Malta, Croatia, Cyprus, Austria, Spain and Greece. The highest occupancy rate of accommodation units is higher in the South of Europe: Cyprus, Malta, Spain and Croatia. The trend of all these indicators is an ascendant one, but the growth rates differ from country to country. The highest rates for arrivals and nights spent are registered in: Lithuania, Latvia, Bulgaria, Croatia, Estonia, and in Slovenia, Romania, Poland the number of arrivals also increased significantly.

The share of foreign tourists number of arrivals and nights spent in total number of arrivals and nights spent in the EU countries also differ significantly, the highest rates being recorded in: Malta, Cyprus, Croatia, Luxemburg, Slovenia and Greece. In many Eastern and Central European countries the share of foreign tourists increased, the most important increases being recorded in: Bulgaria, Latvia, Romania, Slovenia - for arrivals and in Latvia, Poland, Romania, Slovenia - for nights spent. The share of foreign tourists also increased significantly in the UK, both for arrivals and nights spent.

By using appropriate statistical-mathematical instruments, Algieri, Aquino & Succurro (2016) reveal that the Northern countries have strong comparative disadvantages in tourism, while Mediterranean countries hold a leading position in tourism, but there are other factors which may also influence the tourism activity, such as: scale-economies, market integration and social order.

A study made on a very important tourist destination, the Balearic Islands, shows that the demand is very dependent on the evolution of economic activity in each of the origin countries and

on the relative cost of living of tourists in the destination (Garín-Muñoz & Montero-Martín, 2007). This fact is valid not only for Balearic Islands, having to be taken into account when creating plans and strategies for tourism. So, this fact shows the opportunity for Eastern and Central European countries in attracting tourists from Western Europe. In addition, the marketing tools need to be used, so the tourist products can be remarked by the tourists. In the present competitive environment, tourism companies, especially the small ones, must permanently use innovation tools to differentiate from the competitors from the point of view of the product, services, personal and image (Cosma, Paun, Bota & Fleşeriu, 2014)

Tourism industry have an ascending path in the EU new Member States, although most of them cannot be compared with the old Member States, as they still lack infrastructure, have poorer marketing strategies and a smaller degree of international awareness concerning their touristic potential (Ana, 2017). The tourism activity is highly concentrated in some areas, especially in some Western EU countries. An important idea that reveals from this study is that after 10 and more than 10 years after the EU accession not all of the Eastern and Central Europe countries took advantage in the same degree of the EU membership opportunity to attract tourists from the older EU Member States. There is still to work on the offers, promotion and infrastructure, because there is still not a fully exploited potential.

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ANNEX

Table no. 1. Evolution index for arrivals at tourist accommodation establishments in the E.U. Member States: total and foreign countries, 2000-2017

Country	Evolution index for arrivals (total)	Evolution index for arrivals (foreign countries)
BE - Belgium	141,8405	115,8595
BG - Bulgaria	322,3229	451,257
CZ - Czechia	169,2677	195,3036
DK - Denmark	146,6599	133,7244
DE - Germany	148,5516	186,9434
EE - Estonia	237,2182*	204,9592*
IE - Ireland	75,96322***	29,8695***
EL - Greece	169,6703	195,5089
ES - Spain	166,0308	166,2944
FR - France	137,8166	111,6308****
HR - Croatia	260,8341	288,6162
IT - Italy	146,1225	161,687
CY - Cyprus	108,3522	101,353
LV - Latvia	448,5574	586,9943
LT - Lithuania	59 1,8221	549,9203
LU - Luxembourg	130,4984	124,1997
HU - Hungary	173,0298	164,9617
MT - Malta	139,7079**	152,1799
NL - Netherlands	150,2727	158,2632
AT - Austria	163,7612	161,7747
PL - Poland	206,7859	204,6357
PT - Portugal	197,4722	220,4626
RO - Romania	221,8892	285,0456
SI - Slovenia	226,2777	288,358
SK - Slovakia	177,851	190,8746
FI - Finland	131,7515	141,51
SE - Sweden	161,4056	171,0982
UK - United Kingdom	135,82***	228,7272***

Source: own elaboration by Eurostat data

(http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=tour_occ_arn2&lang=en)

* 2002 instead of 2000; ** 2004 instead of 2000; *** 2016 instead of 2017; **** 2015 instead of 2017

Table no. 2. Evolution index for nights spent at tourist accommodation establishments (number) in the E.U. Member States: total and foreign countries, 2000-2017

Country	Evolution index for nights spent - number (total)	Evolution index for nights spent - number (foreign countries)
AT - Austria	133,53071	133,46716
BE - Belgium	132,38696	120,16371
BG - Bulgaria	304,57882	330,85621
CY - Cyprus	96,336529	94,832881
CZ - Czechia	120,40692	168,34562
DE - Germany	134,39834	195,92403
DK - Denmark	127,78806	119,07777
EE - Estonia	241,47249*	207,77152*
EL - Greece	178,93364	189,87137
ES - Spain	136,7128	130,78504
EU28	145,65921***	173,03147**
FI - Finland	136,60401	165,83576
FR - France	154,59506	119,8703****
HR - Croatia	279,00618	301,03605
HU - Hungary	154,71743	133,28446
IE - Ireland	103,9489*****	77,928287*****
IT - Italy	124,12145	150,08785
LT - Lithuania	523,81435	539,81269
LU - Luxembourg	111,39002	108,17849
LV - Latvia	333,65338	488,73431
MT - Malta	123,82292***	124,25171**
NL - Netherlands	137,45224	170,17546
PL - Poland	171,90888	242,41081
PT - Portugal	171,69459	189,58528
RO - Romania	152,5249	245,09505
SE - Sweden	147,41119	169,15365
SI - Slovenia	191,43031	258,72711
SK - Slovakia	140,17423	143,55122
UK - United Kingdom 2016	169,06661*****	378,57822*****

Source: own elaboration by Eurostat data

(http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=tour_occ_nin2&lang=en)

* 2002 instead of 2000; ** 2003 instead of 2000; *** 2004 instead of 2000; **** 2015 instead of 2017; ***** 2016 instead of 2017;

Table no. 3. Evolution index for total nights spent at tourist accommodation establishments (per thousand inhabitants) in the E.U. Member States, 2000-2017

Country	Evolution index for nights spent – per thousand inhabitants (total)
LT - Lithuania	605,205
LV - Latvia	360,05136
BG - Bulgaria	337,22701
HR - Croatia	270,67206
EE - Estonia	239,03131*
EL - Greece	165,61932
PL - Poland	164,00941
SI - Slovenia	163,57069
RO - Romania	162,73028
PT - Portugal	155,12831
UK - United Kingdom	152,00668
HU - Hungary	149,05603
EU28	135,0352**
SK - Slovakia	132,129
FR - France	131,03458
DE - Germany	130,24938
SE - Sweden	129,34038
NL - Netherlands	122,13003
AT - Austria	119,74056
FI - Finland	119,51515
DK - Denmark	118,38
BE - Belgium	114,2068
ES - Spain	113,83512
IT - Italy	111,57988
CZ - Czechia	109,5093
MT - Malta	106,73301**
LU - Luxembourg	85,669283
IE - Ireland	83,105276
CY - Cyprus	71,721925

Source: own elaboration by Eurostat data

(http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=tour_occ_nin2&lang=en)

* 2002 instead of 2000; ** 2004 instead of 2000