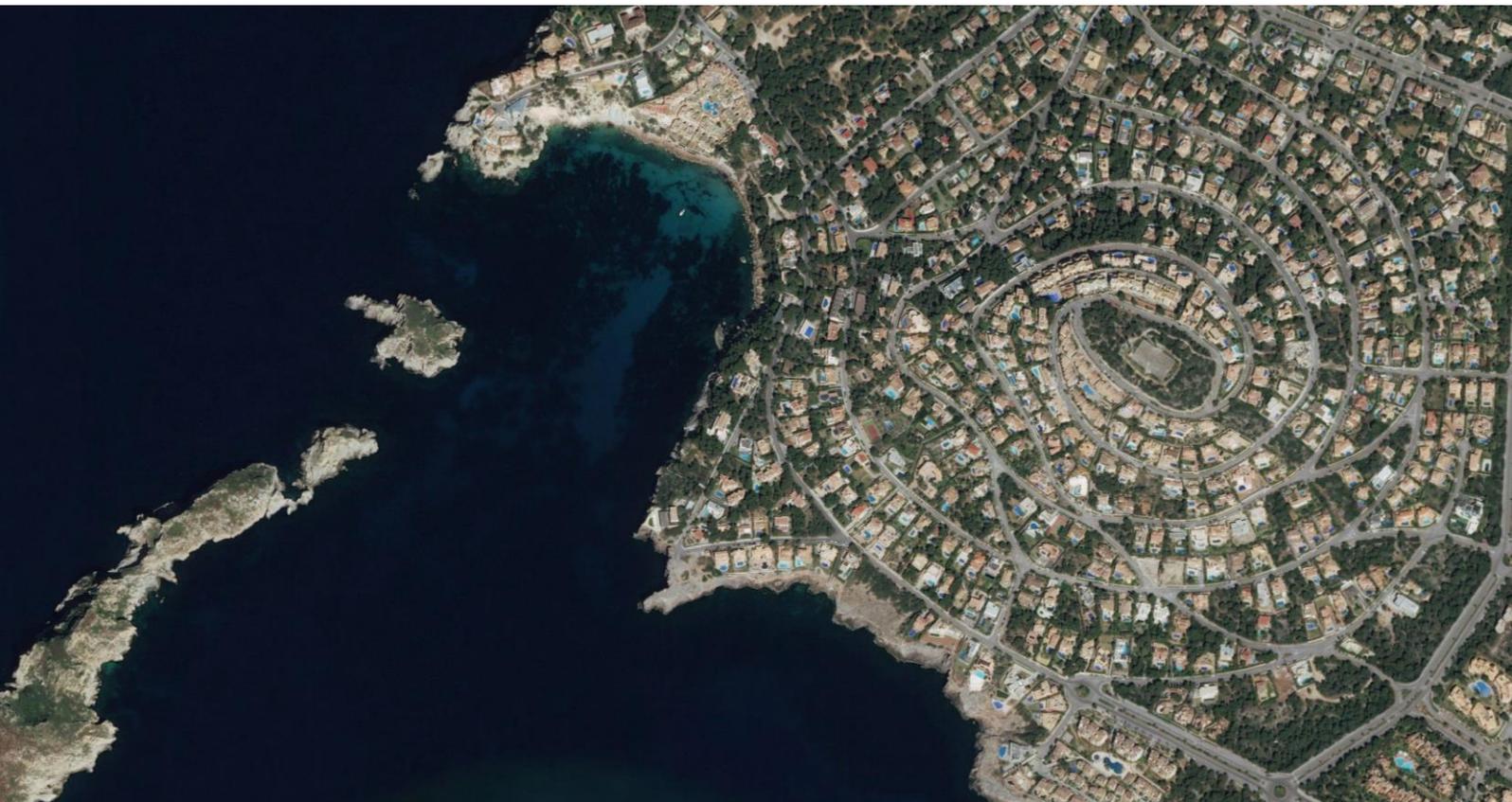


Tourism and the environment

Towards a reporting mechanism in Europe



ANNEX 3. Indicator assessment TOUR001

Tourism flows (3). Seasonality of tourism



Cover design: ETC/ULS

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Indicator name: TOUR001 – Tourism flows (3). Seasonality of tourism

Assessment

Indicator name

TOUR001g – Monthly distribution of nights spent at EU-28 level

TOUR001h – Seasonal distribution of nights spent at country level

Key policy question

Do we better spread the tourism season over the year?

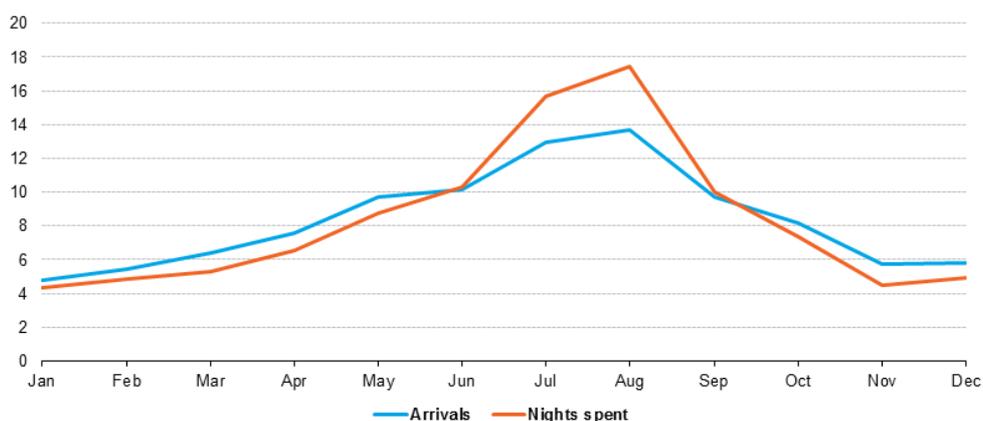
Key message

One of the key problems that tourism has to face -in sustainability terms- is its seasonality. Most countries and their tourism destinations suffer this problem. Seasonality of demand makes it very difficult to plan and manage the provision of tourism facilities efficiently. For a short period of time there is a need for additional infrastructures at the destination level (i.e. roads, parking spaces, etc.) that use more land. Moreover, to avoid environmental damages the waste and water management systems are under pressure to respond the higher demand during high season. A process of stimulating demand and use in less busy seasons, taking up existing capacity, would enable revenue from tourism to grow while putting less pressure on the environment and community than would result from a growth in peak demand. However, from an environmental sustainability perspective, seasonality can also be seen as a positive issue, since during some parts of the year wildlife is not under tourism pressure (i.e. some mountain areas are closed to tourists during some part of the year, and this is crucial for some animal species reproduction).

Key assessment

Data from Eurostat show that, taking Europe (EU-28) as a whole, tourist overnights spent (by residents and non-residents) in August are on average four times higher than in the lowest month (January). July and August accounted for one third (33.0 %) of all nights spent in tourist accommodation in 2015. The period from June to September represented more than half (53.7 %) of all nights spent during the year.

Monthly distribution of the total number of arrivals and nights spent at tourist accommodation establishments, EU-28, 2015 (%)

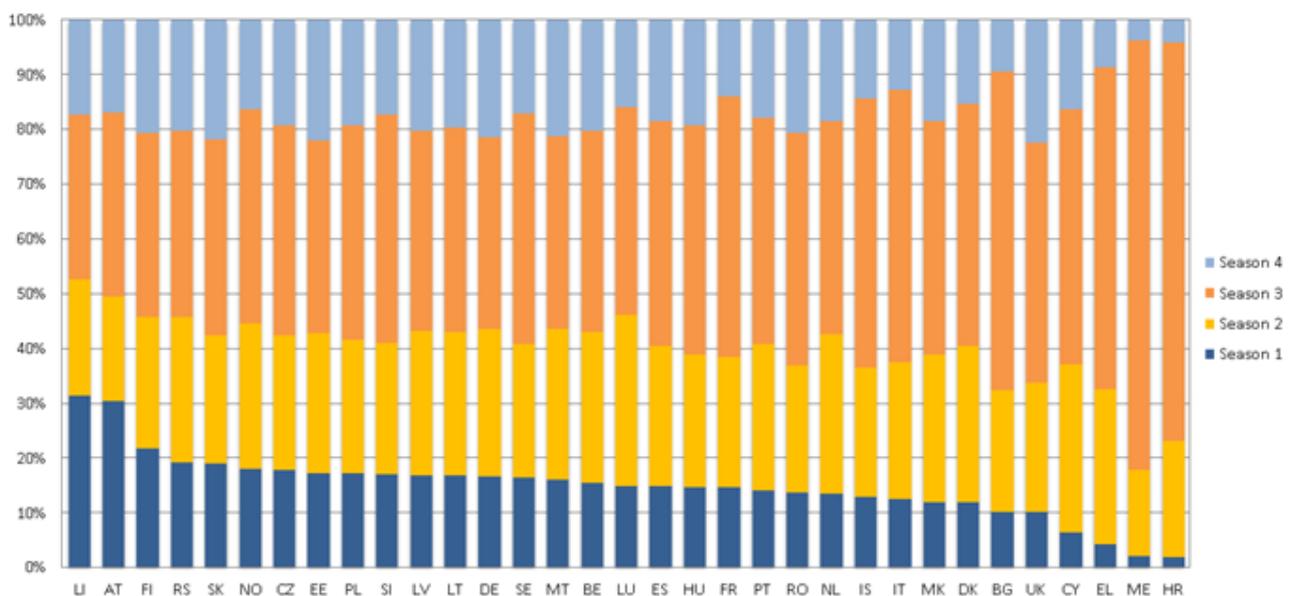


Source: Eurostat (2016).

The summer peak is more acute in eight countries, including typical Mediterranean destinations (Croatia, Greece, Cyprus, Italy and France) but also Bulgaria, Denmark and Macedonia. It should be noted that these statistics are aggregated at country level, therefore low seasonality at country level does not preclude high seasonality within a certain region. Finally, the Alpine countries of Austria and Liechtenstein show a false low seasonality, since in fact they have two clearly marked high seasons (winter and summer).

When analysing the ratio between the peak and bottom month, it can be seen that the EU average is 4.0 (the nights spent in the peak month of the year is 4 times the number of the bottom month). However, there are some countries that have a much higher ratio (especially Croatia, but also Greece, Cyprus and Bulgaria). At the other extreme, countries like Slovakia, Finland, Serbia, the Czech Republic, Germany, Switzerland, Estonia, Latvia, and Poland, have a ratio below 3.0.

Nights spent at tourist accommodation establishments, per country and season (2015)



Source: Own elaboration from Eurostat (2016).

Specifications

Indicator definition

Data show monthly nights spent at tourism accommodation establishments at EU-28 level, and quarterly nights spent at tourism accommodation establishments per country.

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Rationale

The concentration of tourism trips into certain periods of the year has a major effect on sustainability. Not only does it seriously reduce the viability of enterprises and their ability to offer year round employment, it can also place severe pressure on communities and natural resources at certain times while leaving surplus capacity at others. It is important to know the distribution of overnight stays all over the year in each destination, region and country, in order to promote, if necessary, actions to reduce seasonality and spread tourism activity over the year.

Policy context

EC and national policies on tourism and sustainable tourism.

Methodology for indicator calculation

Data is directly provided by EUROSTAT statistics (tour_occ_nim).

Data specifications

Data comes from EUROSTAT.

Data sets uncertainties

Data only takes in consideration official commercial establishments. It does not cover other types of tourism accommodation (B&B, sharing economy establishments, second homes, etc.).

Ownership and contacts

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