

## Managing Tourism Seasonality in European Countries

Corina Aurora Barbu

Alexandra Popa

Alina-Elena Ionaşcu

„Ovidius” University of Constanţa, Faculty of Economic Sciences, Romania

[coribarbu@yahoo.com](mailto:coribarbu@yahoo.com)

[alexandrapopa946@gmail.com](mailto:alexandrapopa946@gmail.com)

[alina\\_cerchia@yahoo.com](mailto:alina_cerchia@yahoo.com)

### Abstract

*Seasonality is an important factor for tourism, having a major impact on tourism activities during certain periods of the year. This is determined by climatic conditions, school holidays or holidays, and is the period when most people are willing to travel. Seasonal tourism is characterized by intense tourist activity, with massive concentrations of tourists at specific times and in specific areas. However, seasonal tourism was significantly affected during the COVID-19 pandemic period (2019-2021) when there was a worldwide tourism freeze through the imposition of movement and travel restrictions. The measures taken during the pandemic had a huge impact on all tourist destinations giving rise to unprecedented situations.*

**Key words:** tourism, destinations, seasonality, management

**J.E.L. classification:** Z32

### 1. Introduction

Although seasonality is one of the most important characteristics of tourism, it is not much addressed in specialty literature. It is often seen from a negative perspective, as it is considered to cause economic and social imbalances, but it is also considered to have a positive impact on tourist destinations and visitors. Seasonality can raise a number of management issues that require the use of specific strategies. Seasonality can put pressure on tourism businesses over a certain period of time, requiring a higher level of workforce involvement. By analysing the seasonality of tourism, the number of visitors and the occupancy rate of tourist facilities increases, with a higher concentration in certain periods of time. In recent years, heavily affected by the COVID-19 pandemic, all tourism activity has been reduced, which is also reflected in seasonal tourism.

This paper focuses on identifying and highlighting the fluctuations of tourists within a calendar year by analysing arrivals and overnight stays in tourist destinations in Europe in 2019-2022. The analysis will consider the major negative impacts of the COVID-19 pandemic on tourism worldwide. The research focuses on the analysis of arrival and overnight stays seasonality in the tourist accommodation sector in the European Union countries, highlighting increases and decreases caused by the pandemic. The aim was to examine arrivals and overnight stays comparatively by month and year (2019-2022), in order to gain an overview of the tourism seasonality during the period under analysis.

### 2. Literature review

In terms of its periodicity, tourism can be continuous or seasonal. While continuous tourism takes place over the whole period of a calendar year, seasonal tourism takes place according to certain conditions and events. Seasonality is a dominant feature of tourism because it is represented by periods when demand meets supply at the highest possible level. Seasonality is determined by natural

causes as well as climatic conditions, the periodicity of tourist events or cultural activities and economic and organisational conditions such as holidays and school vacations. In other words, seasonality in tourism activities can be characterised by an increased number of visitors in a given period of time due to different factors: climatic, cultural or economic.

Baron (1973) first defined seasonality in tourism as "the incomplete and unbalanced use of the means available to the economy, and it is similar to business cycle disequilibrium, where the economy is either overheated or operating below its full potential at different phases of the cycle". According to Butter (1994), seasonality in tourism is a time imbalance that can be determined by several factors such as spending, employment, number of visitors, etc. Higham and Hinch (2002) consider that most tourist destinations in the world are characterised by methodical variations throughout the year. According to Holloway (1994) tourist visits do not only vary over the course of a year, but can vary over a month, a week or even a single day. (Holloway, 1994)

Seasonal tourism activity has been studied more closely by Butler and Maio (1997), who argue that tourism seasonality has two major dimensions: natural and institutional. Natural factors that can determine tourism seasonality refer to climatic variations and phenomena, which are independent of human will. The institutional dimension, unlike the natural dimension, depends on human behaviour and is based on consumer decisions. The latter is represented by cultural and social factors and relates to holidays, vacations, traditions, sports or hobbies (Butler & Maio, 1997).

Although driven by many factors, seasonality is reflected in people's behaviour through the number of visitors and the occupancy rate of tourist establishments as well as the consumption of tourist products. Seasonality plays a key role in determining tourism demand and consumer behavior regarding tourism products. A literature review also reveals that the notion of push and pull factors in tourism motivation supports the role of seasonality on tourism demand and behaviour (Butler & Maio, 1997).

The factors that determine tourism seasonality are interrelated and can generate complex interactions that the tourism industry needs to manage by implementing different management and marketing strategies such as differential pricing, diverse facilities and attractions, offering high quality facilities and services (Commons & Page, 2001). Given that seasonality of tourism demand marks the whole tourism activity, it is necessary to manage at the highest level in order to better manage the tourism offer and the flow of tourists. The extent of seasonal fluctuations has a major impact on tourism and its efficiency, so that their management requires greater attention. Seasonality implies a greater use of the material base and labour force, which can affect the quality of services and their costs. Providing quality services during the seasonal period requires the active involvement of all resources and their good management, which in turn leads to higher prices for tourism.

Implementing management strategies for seasonal tourism can help mitigate negative impacts. In this respect, tourism operators need to have a good understanding of the causes of seasonality and its implications and impacts. The causes that determine seasonality are beyond the control of the operator, but can be managed through various actions: thus, managers can respond to the impact of tourism seasonality by taking action in three different directions: costs, employment and quality of facilities and services (Goulding, Baum & Morrison 2004). In terms of costs, prices are higher, there is income instability and seasonal costs must cover fixed costs throughout the year, etc. (Commons & Page 2001). Employment over a given period is more difficult to achieve. If demand for labour is sporadic, a lack of experience and commitment intervenes, leading to lower service quality and consumer satisfaction. Last but not least, there is under- or over-utilisation of resources in terms of facilities offered, which also leads to low consumer satisfaction. (Commons & Page, 2001).

According to Phelps (1988) seasonal tourism management strategy should depend on the nature of the facilities offered. In the more recent literature it is considered that management should take into account all three of the above dimensions as well as involving environmental and safety actions. In concrete actions, managers can use strategies such as financial and budgetary planning, offering promotional pricing and group booking offers. They can also diversify offers and attractions for consumers, carry out marketing campaigns or defer holidays over a longer period. (Goulding et al., 2004)

Jang (2004) also considers that two distinct ways can be used to manage the problems caused by tourism seasonality, which relate to reducing the season itself and reducing the negative effects of seasonality. These include the strategies described above but also involve marketing actions such as

the deliberate creation of additional demand through the organisation of promotional events (Jang, 2004). This type of approach requires greater investment and stakeholder involvement, which is why most tour operators prefer to focus on popular promotional tools.

With the advent of the Covid-19 pandemic, managing the tourism season had become even more complicated as the industry had been affected to a very large extent. Thus, as described by Marome and Shaw, businesses in the tourism and service sector became unstable and financially insecure during COVID-19. In 2020 there was a massive drop in demand experienced by the tourism industry during the peak season, with employers forced to make large-scale layoffs and reduce or even stop their business.

The enforcement of travel restrictions and border closures have caused a huge slump in the tourism industry and caused massive losses in the world economy. Even during seasonal periods when tourist numbers were higher than normal, there were huge falls in tourist numbers caused by the restrictions and measures imposed. Domestic markets have emerged as more reliable sources of tourist activity, ahead of international markets, which have a more significant economic impact but present a higher risk.

The mobility restrictions imposed by the pandemic have increased the strategic value of the domestic tourism market. Thus, seasonal tourism was more developed domestically than internationally during the pandemic. Domestic destinations competed to attract domestic tourism as international mobility was drastically reduced in 2020. In Spain, for example, many destinations focused their summer 2020 campaigns on the domestic market (Donaire & Galí, 2021). Although there were also agreements between neighbouring countries, which allowed seasonal holidays to be carried out safely for a limited number of tourists, more tourism activity took place within their own countries, which led to an increase in seasonal tourism in home countries in terms of domestic tourists.

According to studies carried out at an European Union level in 2021, the proportion of domestic and foreign visitors varies between EU Member States. In countries such as Germany, Sweden, Poland or Romania more than 75% of tourist arrivals are domestic, while countries such as Malta, Croatia or Luxembourg have a higher number of foreign visitors. Portugal, Spain and Italy recorded roughly equal numbers of domestic and foreign visitors. (EU Support of Tourism, 2021)

The Covid-19 pandemic reduced international arrivals among EU countries by 67.5% in the first three quarters of 2020. The most affected countries in terms of visits by foreign tourists in 2020 were Austria, Luxembourg, the Netherlands, Germany, Belgium, etc. This caused losses of up to 50% in GDP and over 2 million jobs lost. (EU Support of Tourism, 2021) These losses are expected to be recovered by 2024.

### **3. Research methodology**

The research methodology is based on EU-wide statistical data on arrivals and overnight stays in tourist accommodation establishments in EU countries by month for the years 2019-2022 to highlight the seasonality of tourism as well as the impact that the Covid-19 pandemic has had on tourism in Europe. The analysis was also carried out in terms of three categories of tourist accommodation types, aiming to identify those that had a higher occupancy during the pandemic.

The indicators chosen to analyse the evolution of seasonal tourism during the Covid-19 pandemic in the European Union are *tourist arrivals in EU countries*; *tourist overnight stays in tourist accommodation establishments in EU Member States*, *the distribution of arrivals and overnight stays by month*, in the period 2019-2021 and in the first 4 months of 2022. The findings were taken from official data provided by EuroStat.

The information obtained from processing official data on monthly arrivals and overnight stays in EU countries has allowed us to get an overview of tourism seasonality and helped to identify fluctuations during the years under analysis (2019-2020). It also identified the countries in Europe where seasonal tourism is most common.

#### 4. Findings

In 2019 the number of arrivals and overnight stays in EU member countries was increasing from January to August and then gradually decreasing until December. Most arrivals were recorded in June, July, August and September of 2019. In 2020 the upward trend was not maintained. Thus, from the 3rd month arrivals and overnight stays decreased drastically, fluctuating in the following months. Months November and December recorded approximately the same number of visitors and overnight stays. In months January-April of 2021 the number of arrivals and overnight stays is roughly in line, with relatively small changes from month to month. In months May-June there was a slight increase and in months July and August the number of arrivals and overnight stays from EU countries doubled, gradually but drastically decreasing in the following months until the end of 2021.

As for 2022, data are available for months January-April, as it is the current year. These first months of 2022 show a low number of visitors but a slight increase until month April, when it doubles compared to the first month of 2022. The fluctuations in arrivals and overnight stays from the EU Member States can be seen in exact figures in Table no. 1.

Table no. 1 Arrivals and overnight stays 2019-2022 (by month) in Europe

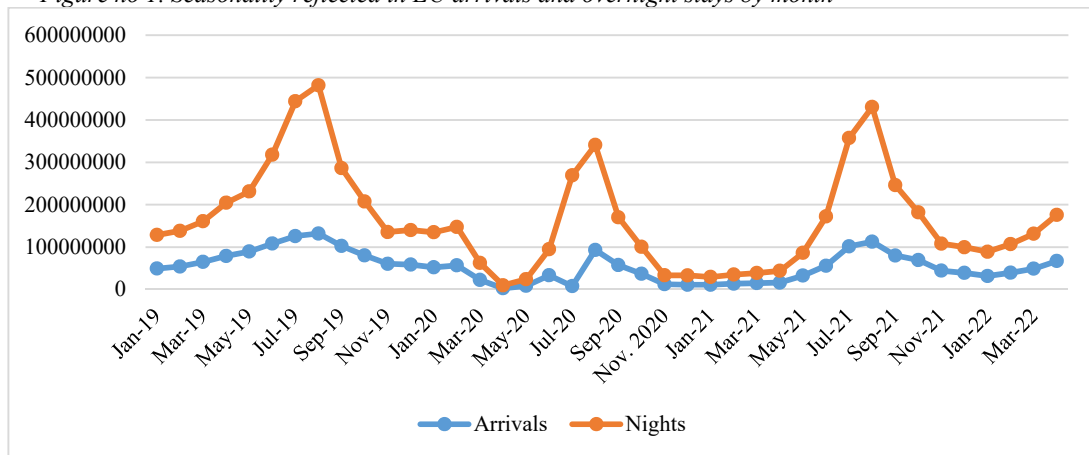
No. crt.	Month	Arrivals	Nights
1.	01.2019	49395133	128692169
2.	02.2019	54222141	138456076
3.	03.2019	65066851	161006014
4.	04.2019	79176433	204653767
5.	05.2019	89524816	231217714
6.	06.2019	108477707	318134695
7.	07.2019	125907344	444169884
8.	08.2019	131946755	481756238
9.	09.2019	102771908	286483585
10.	10.2019	80321819	207705402
11.	11.2019	60628564	135494244
12.	12.2019	58603499	140159246
13.	01.2020	52230434	135027352
14.	02.2020	56856885	147685570
15.	03.2020	22622779	62806244
16.	04.2020	2865237	9763338
17.	05.2020	8525843	24263499
18.	06.2020	33402917	95147311
19.	07.2020	7812162	269511271
20.	08.2020	93210308	340921945
21.	09.2020	57616349	170440612
22.	10.2020	36923113	100539682
23.	11.2020	12495956	33459707
24.	12.2020	11274575	33219628
25.	01.2021	11176475	29598797
26.	02.2021	13753022	35285059
27.	03.2021	14958594	38793905
28.	04.2021	16217174	44166456
29.	05.2021	32747938	86610331
30.	06.2021	55999710	172340299
31.	07.2021	101829055	357445772
32.	08.2021	112787870	430649285
33.	09.2021	80128676	246151906
34.	10.2021	69497975	181871718
35.	11.2021	44423604	108230668
36.	12.2021	39177067	99710862
37.	01.2022	31947709	89071050
38.	02.2022	39556407	106980225
39.	03.2022	49105864	131519896
40.	04.2022	67115176	176115016

Source: Eurostat: <https://ec.europa.eu/> (Accessed on 7th October 2022)

Tourism seasonality can be seen in Fig. 1. which shows an increase in arrivals and overnight stays in the months of June-September 2019-2020. Seasonality fluctuates in the years analysed due to the COVID-19 pandemic. Thus, in 2020 there was a decrease in arrivals and overnight stays of more than 50% compared to 2019. Although in 2021 arrivals and overnight stays showed a slight increase compared to the previous year (25%), there was still a major deficit, with 39% less than in 2019.

Monthly statistics from the years analysed show that seasonality was more pronounced in 2020 despite overall decreases in arrivals and overnight stays from EU member countries. This was considerably influenced by the lifting of some of the travel restrictions in the summer months of this year. In 2021 the seasonality pattern was closer to that of 2019. Thus, although seasonality is more pronounced in 2020, the overall recorded decrease in arrivals and overnight stays was drastic. Signs of recovery in European tourism become visible in 2021.

Figure no 1. Seasonality reflected in EU arrivals and overnight stays by month



Source: Eurostat: <https://ec.europa.eu/> (Accessed on 7th October 2022)

Figure no. 2 shows the monthly distribution of nights spent in EU accommodation establishments as a share of total annual arrivals and overnight stays. According to the data analysed, in 2021, as in previous years, seasonal fluctuations were less important for hotels than for other tourist accommodation. In 2019 the fluctuation in hotel overnight stays shows an increase in the months of June-September compared to the previous months, with overnight stays being up to 50% higher. In 2020, the lowest number of overnight stays was recorded in July and August, with an increase of about 25% compared to the previous months.

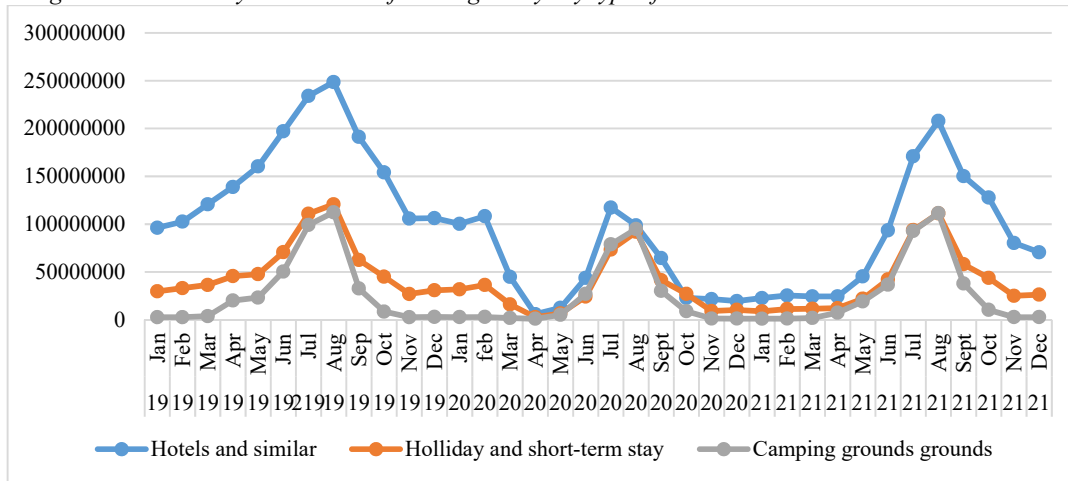
The biggest increase in the summer months was in campsites, as they are more dependent on weather conditions and are often closed during the winter. Thus, campsites experienced the highest concentration of overnight stays in the June-August months of 2021. In the other months of 2021, however, overnight stays in campsites were extremely low, with the exception of April when there was an increase. In 2019 the months of June, July, August saw an increase, but not a very large one, and in 2020 seasonality was evidenced by an increase of over 70% in the summer months compared to the previous months.

As far as short-stay accommodation is concerned, the biggest increase was recorded in 2021. In almost all EU member countries, more than half of holiday and other short-stay accommodation nights were in the third quarter.

In all EU countries, the third quarter of each year analysed was the peak season for all three types of tourist accommodation. In most countries, the peak for hotels (51% in the third quarter on average for the EU) was lower than the peak for both types of tourist accommodation (57% for holiday and other short-stay accommodation and 74% for campsites in the third quarter on average for the EU).

Seasonality is thus more prominent in the campsites, followed by short-term accommodation. Hotels are where seasonality is least reflected during the period under review. This can be justified by the fact that hotels are open and available throughout the year, while camp sites are more active during the warm season and are occupied to a greater extent by pupils and students who travel during the summer holidays more than during the rest of the year.

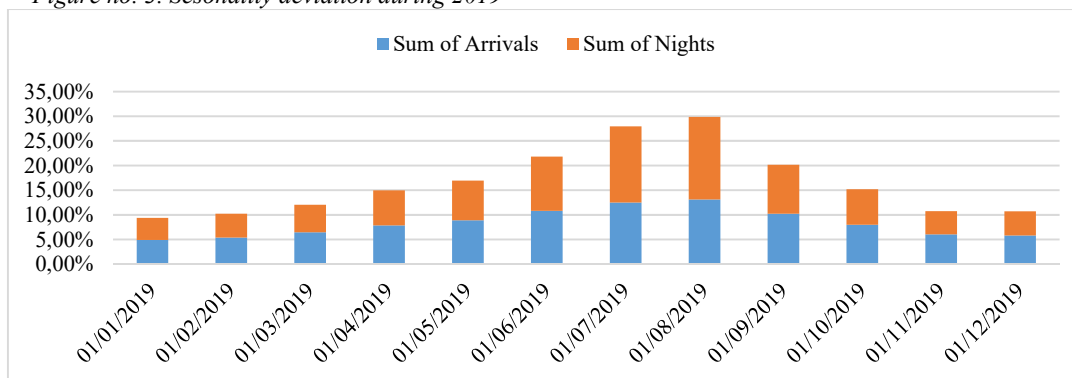
Figure no. 2. Monthly distribution of overnight stays by type of accommodation



Source: Eurostat: <https://ec.europa.eu/>(Accessed on 7th October 2022)

In order to highlight the seasonality of each year among those analysed, the data were analysed on a percentage basis. Thus, it was found that in January 2019 arrivals and overnight stays accounted for 5% of the total arrivals and overnight stays in that year, as well as the following month. In March and April arrivals and stopovers accounted for 6% and 7% respectively of total arrivals and overnight stays. Since May these have increased by about 2 percent and in the summer months the percentage has doubled. Thus, June, July, August and September accounted for 46.64% of total arrivals and overnight stays in the European Union, marking a considerable increase in summer travel and highlighting the discrepancy with the rest of the year. From September onwards, however, arrivals and overnight stays fell by 30% compared to the previous month and continued to fall in the following months, reaching 5.86% of total arrivals and overnight stays in January and a fall of around 40% compared to September.

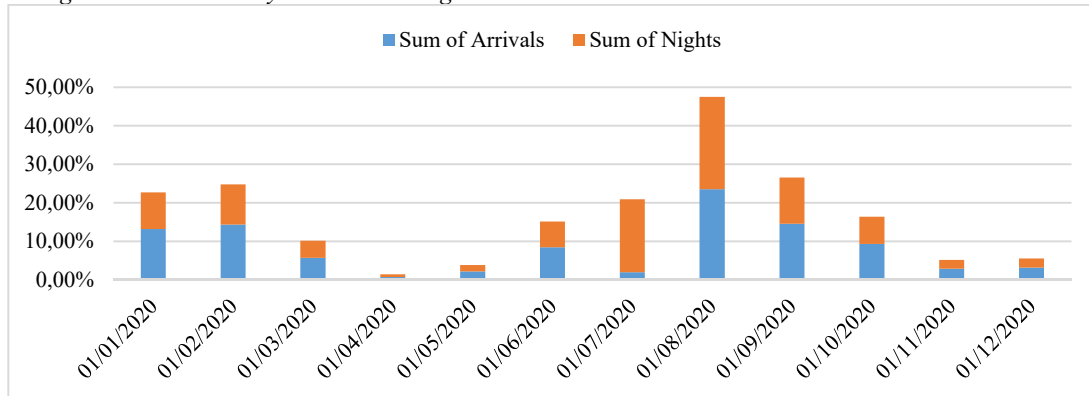
Figure no. 3. Sesonality deviation during 2019



Source: Eurostat: <https://ec.europa.eu/>(Accessed on 7th October 2022)

In the first months of 2020 (January; February) the percentage of arrivals and overnight stays was 13-14% of the annual total. Only 5% of the total arrivals were recorded in March, following a drastic decrease in the following months, reaching a 0.72% in April. These declines were caused by the Covid-19 pandemic. The year 2020 saw a decline in July-August-September. August saw 23% of all visitors in 2020, a year extremely affected by the pandemic. However seasonality is more prominent this year than in 2019, with an increase in arrivals of up to 50% in August compared to April.

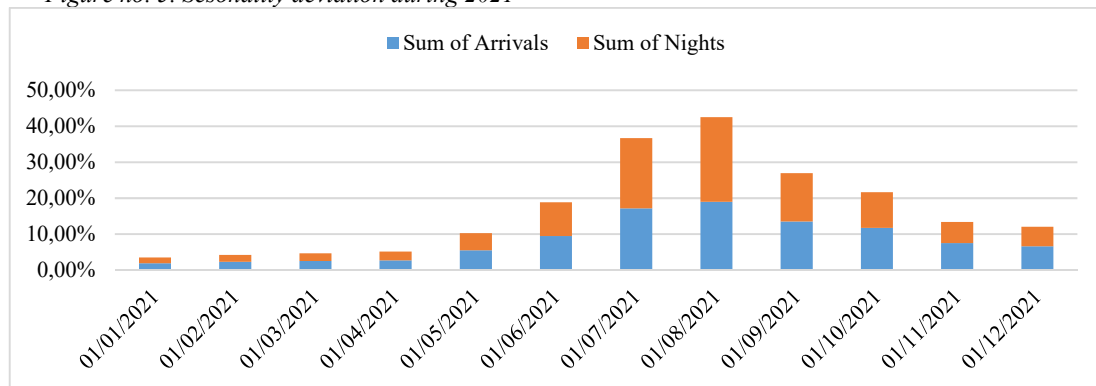
Figure no. 4. Sesonality deviation during 2020



Source: Eurostat: <https://ec.europa.eu/>(Accessed on 7th October 2022)

The first months of 2021, also heavily affected by the pandemic, accounted for 9.47% of total arrivals from the European Union, while in July, August, September the arrivals rate was 61.46% of the total. This shows a discrepancy of 52% between the first quarter and the second quarter of the year. From October onwards, the percentage of arrivals and overnight stays in European countries began to fall gradually, reaching 6% in December.

Figure no. 5. Sesonality deviation during 2021

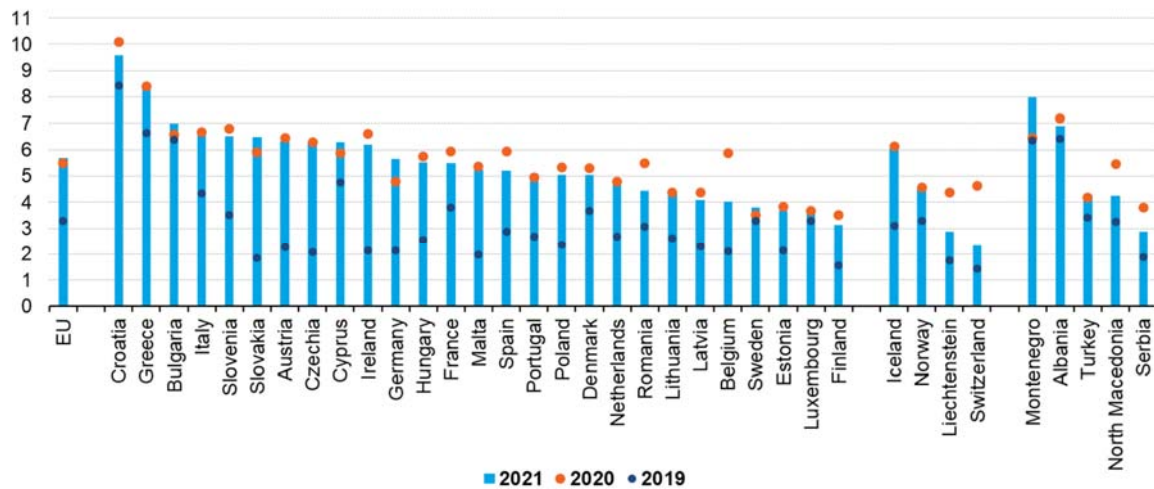


Source: Eurostat: <https://ec.europa.eu/>(Accessed on 7th October 2022)

The above analysis refers to the general situation of tourism seasonality in the European Union, but this may differ from country to country. Thus, the highest seasonality in 2019 was recorded in countries such as Croatia (8.4); Greece (7.8), Albania and Montenegro (7.4), Pecum and Bulgaria (7.2). In 2020, although the number of overnight stays decreased due to the Covid-19 pandemic, seasonality increased both in countries where it was already high and in other countries that had not experienced high seasonality the previous year. The highest rates were reached in Croatia (10.1), Greece (8.6), Albania (7.1), Montenegro (7.5). The discrepancy is major for countries such as Italy, Slovenia, Austria, Czech Republic, Cyprus, France, Malta, Iceland, Switzerland, where seasonality increased considerably compared to 2019.



Figure no. 6. Seasonality deviation by countries



Source: Eurostat: <https://ec.europa.eu/>(Accessed on 7th October 2022)

The largest seasonal deviations in 2021 (measured as the average monthly deviation from the average relative share) were observed in Croatia and Greece with 9.6, and 8.5 points respectively. These two countries were followed by Montenegro and Albania (8 and 6.9 points) and Bulgaria, Italy, Slovenia and Slovakia (all with around 6.5 points). In these eight countries the peak month was August, with the highest overnight stays.

## 5. Conclusions

The analysis of the data collected showed that seasonality is a significant part of tourism in Europe. Seasonality is caused by different natural or economic and social factors and causes a discrepancy in the number of arrivals and overnight stays throughout the year, which differs from month to month. However, seasonality represents a concentration of more visitors in 2 or 3 consecutive months and it has been observed that these months are mainly summer months. This is primarily due to favourable climatic conditions and school holidays, but also to tourists' holidays.

Tourism seasonality in the years under review (2019-2021) was affected by the Covid-19 pandemic, devastating the entire tourism industry. However, an increase in seasonality was identified in 2020, the year most affected by the pandemic. The slope of seasonality was steepest in 2020, followed by 2021, while in 2019 its line was smoother. In terms of the months with the highest number of arrivals and overnight stays in the years analysed, it could be seen that in 2019 June-September were on the rise, in 2020 June-August and in 2021 July-September.

In terms of the types of tourist accommodation analysed, it was found that the seasonality of tourism makes its presence felt most among campsites. Thus, overnight stays experienced the greatest increase in the summer months in campsites in 2019 and 2021, with a drastic downward trend in 2020. The existence of a greater degree of tourist seasonality among campsites is determined by the fact that they are not open in winter (or at least most of them). On the other hand, seasonality among hotels is quite low precisely because they are open all year round and in different regions where they can also operate in cold seasons (e.g. for winter sports). Short-stay accommodation units have seen the highest seasonality in July, August and September.

Looking at each year individually has helped to draw both individual and comparative conclusions about tourism seasonality. In 2019 this is shaped by an increase of up to 40% in arrivals and overnight stays in EU countries in June, July and August. Seasonality in 2020 is marked by an increase of more than 50% compared to the other months, as in 2021. However, the steepest slope in seasonality is observed in 2020 despite the drastic drop in arrivals and overnight stays caused by the travel restrictions imposed by the Covid-19 pandemic.



The countries where seasonality is most prominent during the period under review are Croatia, Greece, Bulgaria, Montenegro and Albania. Among the countries where seasonality is least noticed are Switzerland, Serbia, Finland, Estonia, Belgium, etc. In the summer months of 2020 many of the countries with a low share of seasonal tourism reached higher shares of it, which is justified by domestic travel during the period when travel restrictions were imposed but also by the fact that summer was considered a favourable period for travel even during the pandemic period, with some of the restrictions being lifted or relaxed.

Seasonality can therefore be seen both in a positive light, in terms of increased tourism during seasonal periods, but also in a negative light, in that there is quite a large discrepancy with the other months of the year. Seasonality of tourism means that tourism activity is unevenly distributed at a given destination and leads to alternating periods of overcrowding and under-use. Given that seasonality can jeopardise the sustainable development of tourism because of its impact on the economy, the environment, society and the labour market, seasonal periods must be managed with greater care so as to ensure profitability rather than further losses.

In this respect, there are strategies that can be adopted at company and destination level to reduce the negative effects that can be caused by the seasonality of tourism. Strategies used at destination level are relevant and can be adopted at company level. In addition, there are key managerial strategies on employment and employee training.

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