

The European market potential for sun and beach tourism

Sun and beach tourism, the largest tourism segment in Europe, is changing. Especially in Western Europe, pure leisure sunbathing holidays are in decline. Although less than in other tourism sectors, travellers increasingly seek unique experiences, which they can enjoy in a sustainable manner. This is an opportunity for entrepreneurs in sustainable sun and beach tourism.

Contents of this page

1. [Product description](#)
2. [What makes Europe an interesting market for sun and beach tourism?](#)
3. [Which European countries offer most opportunities in sun and beach tourism?](#)
4. [What trends offer opportunities in the European sun and beach tourism market?](#)

1. Product description

Sun and beach tourism, also called coastal tourism, is the largest tourism segment in the world and in Europe, [providing many jobs](#). Travellers enjoy beach tourism for the combination of scenic beauty with fresh air and recreational activities.

The most common activity for Europeans on a beach holiday is relaxing, which means they go sunbathing, swim, picnic and play on the beach. For many young people, beach holidays also includes partying and clubbing.

For other tourists, beach holidays include [nature tourism](#). These travellers may enjoy the beach and its surroundings also as places to practise other activities like hiking and [cycling](#). A subcategory of nature tourism is marine tourism, which is related to wildlife tourism that includes activities such as whale or dolphin watching.

Other beach-related activities on the adventure side include snorkelling, diving, sailing, kayaking and surfing. See more information about these tourism niches in our studies on [surf tourism](#) and [dive tourism](#).

Examples of companies focusing on adventure activities include:

- [Hooked Cabarete](#) in the Dominican Republic, targeting surfers;
- [Aquanaut Diving Club](#) in Egypt, targeting scuba divers, diving courses and underwater safaris;
- [Whale Dive Tonga](#), offering an eco-friendly approach to whale watching underwater.

A very small niche within sun and beach tourism is volunteer tourism, such as [Responsible Travel](#) (turtle egg protection), and [Ankobra Beach Resort](#) in Ghana, offering marine conservation, education and plastic recycling projects with the local community. Volunteer tourism however is [often criticised](#) for the lack of skill of volunteers to make any tangible contribution and for the fact that continuity is not always guaranteed, among other reasons.

Tips:

Offer activities related to physical and mental wellness, such as massages and yoga lessons, since most tourists see the beach as a place to relax.

Offer services [nature tourists](#) will enjoy, such as guided tours of your coastal ecosystem, bike rentals, snorkelling and sea safaris. Look up [The Safari Blue](#) in Tanzania.

Provide customers with information about hiking routes and viewpoints.

Promote the natural qualities of your area.

Either focus on relaxation and treat adventure activities as a supplementary activity, or fully focus on an adventure activities.

Many rivers and lakes also offer opportunities for sun and beach tourists to relax, lie down and swim. Sandy shores are preferred, but other types of shores may do well too. Examples in this category are [Hat Salung beach](#) in Thailand, [beaches near the Malawi Lake](#) in Africa, and the [beaches around Lake Titicaca](#) in Bolivia and Peru.

Because sun and beach tourism is the most popular tourism type, it may create over tourism, which may also affect the functioning of a coastal ecosystem, such as [the flattening of dunes, elimination of natural vegetation, and draining and pollution of wetlands](#).

Tips:

Exploit a beach at a river or lake if you are not close to the sea. Many Europeans see a beach as the ultimate place to relax and there is less competition far from the sea.

Getting the proper beach ambience away from the sea may need extra effort. Use music, architecture and furniture, but also offer other beach-associated activities, like fishing, seafood, beach volleyball, beach-themed parties and kayaking to contribute to the beach atmosphere.

Offer accommodation by a river or lake beach, such as [Mama Leuah Guesthouse](#) in Laos.

Make sure the beaches around your facility are clean. Pollution scares visitors.

Invest in environmentally friendly initiatives. European visitors may be more concerned in a harmonic collaboration with coastal nature than local tourists are, and they may be also willing to pay more for it.

2. What makes Europe an interesting market for sun and beach tourism?

Approximately [60% of all European tourists](#) prefer to vacation along the seaside, which is high compared to the United States (43%), but low compared to China (68%). For Europeans, relaxation is also the most important reason to go on holiday, while for Americans it is to spend time with friends.

When they go outside of Europe on holiday, most European tourists go to the beach in Asia. Thailand is a [very popular destination for sun and beach European tourists](#).

The percentage of [Europeans who prefer sun and beach holidays](#) declined 4% between 2014 and 2016. Although more recent numbers are not available, the experts we interviewed confirmed that this decline is still going on, and is expected to continue in the coming years, especially in Western Europe. However, more people now combine sun and beach tourism with other types of tourism.

Tips:

If your accommodation has a beach nearby, make sure to promote it. European tourists are willing to pay more when there is a beach nearby.

Focus on families with children, who enjoy going to the beach on at least a part of their trip.

Work with destination management companies (DMCs), local tour operators or small European tour operators.

3. Which European countries offer most opportunities in sun and beach tourism?

The number of people who prefer sun and beach holidays varies in each European country. The demand for sun and beach holidays is strongest among people in Eastern European countries like Slovenia, Croatia and Greece. Hover your cursor over the map below to see the percentage of travellers who prefer sun and beach tourism in each European country.

Where Europeans travel to on sun and beach holidays depends greatly on where they come from.

Germany - the largest market

Germany offers a very large sun and beach market in Europe. Germany's population of 82 million is the largest in the EU. Germany is also the largest economy in the EU and fourth-largest in the world, with a GDP of €3.5 trillion and €43 thousand per capita.

In 2017, Germans made 10 million trips to developing countries. Among German tourists, 25% see the beach as their [main reason for going on holiday](#). However, [most beach holidays booked by Germans](#) have a destination in the Mediterranean. On average, approximately [4% of German holiday budgets](#) is spent on long-haul beach holidays. Within Germany, the people from Rhineland show the [most interest in beach holidays](#).

Table 1: German travellers' long-haul destinations 2017

Destination	Percentage of long-haul trip bookings
South East Asia	23%
North America	20%
Caribbean	15%
Africa	14%
Latin America	8%
India	6%
Middle East	6%
China	4%

Australia and New Zealand	4%
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Source: [Reiseanalyse](#) 2018

You need to offer sufficient information to attract German and FITs. They tend to seek a lot of information before deciding to go visit a place. Like most Europeans, Germans are quite straightforward in their communication style, but they are also well known for their organisation and punctuality.

The United Kingdom - highest preference in Europe for sun and beach tourism in developing countries

With a population of 66 million and a gross domestic product of €2.3 trillion, the United Kingdom is the fifth-largest economy in the world and the second in Europe. The UK's GDP per capita is €38 thousand per year, suggesting the British have less disposable income for sun and beach holidays.

The British have a high preference for sun and beach destinations in developing countries, and a high [preference for sun and beach tourism itself](#) (27%). Turkey with 1.6 million trips, Thailand and India, each with 1 million trips are the most visited developing country destinations by British tourists, according to UNWTO data.

France

France has the third-largest population in the EU, with approximately 67 million people. It is also the EU's third economy and the seventh largest economy in the world with a €2.4 trillion GDP.

Although sun and beach holidays make up a [22% share of the French market](#), the French [prefer active vacations types](#). In market size, however, France is still the third-largest European sun and beach market.

Important developing country destinations for the French include Morocco, Tunisia and Turkey.

For the French, natural features are [the most mentioned reason](#) to return to a previously visited destination. Almost 80% of the French tourists [prepare their holidays online](#).

Slovenia

Slovenia is one of Europe's smallest markets with only 2 million people. It accounts for [100 thousand trips to developing countries](#) yearly, which is equivalent to only 1% of the total trips to developing countries from Germany or the United Kingdom. However, if you have a limited marketing budget, entering a small market may be an advantage. In Slovenia, 52% of the tourists see beach tourism as [their primary holiday type](#), the largest preference in Europe.

One important factor to keep in mind is that 70% of all Slovenian travellers going to a developing country destination went to one of the top-7 such developing country destinations. This is also true in most Eastern European countries, where people will travel to a few, mostly nearby developing country destinations, which accountable for a large market share.

Table 2: Slovenian travellers' top developing country destinations in 2017

Destination	Number of trips
1. Turkey	25,105

2. Albania	14,111
3. Thailand	10,506
4. China	7,503
5. Tunisia	6,903
6. Ukraine	6,083
7. Morocco	5,461

Source: [UNWTO](#) 2019

Ireland

Ireland has a population of 4.9 million, making it one of the smallest European tourism markets. With a GDP per capita of almost €70 thousand, Ireland is, in principle, a high-income country. The process of the UK leaving the EU (Brexit) may however highly impact the Irish economy. An above-average percentage of 29% of the Irish see sun and beach [as the most important reason to go on holiday](#).

The main language in Ireland is English. According to UNWTO 2017 data, Thailand (69 thousand trips), Turkey (50 thousand trips), China (42 thousand trips), India (38 thousand trips) and South Africa (34 thousand trips) were the most visited developing country destinations by Irish travellers.

Croatia, Greece and Portugal

Although Croatia, Greece and Portugal have very high rates of preference for sun and beach holidays, we don't position these countries among the most interesting European sun and beach tourism markets. That is because sun and beach travellers in these countries overwhelmingly travel domestically. If you target one of these countries, make sure to emphasise cultural differences or other natural sights; a beautiful beach alone will certainly not be sufficient.

Tips:

See how many travellers come to your country from each European country by reading our [analysis of air flows of European travellers](#). Read more about the demand for tourism in [our study of outbound tourism in the European tourism market](#).

Target Slovenia if low-cost flights from Slovenia are available, since Slovenians tend to travel only to a few developing countries with direct connections.

4. What trends offer opportunities in the European sun and beach tourism market?

Unique experiences

Travellers are increasingly seeking unique experiences rather than just travelling to a destination and lying on the beach for a week. This is especially the case for [Generation Y](#) or millennial travellers. Although there is still a

large market for mass sun and beach tourism, this market is changing, especially in Western Europe. Pure leisure tourism is in decline.

European tourists are eager to avoid crowds. Managers of large European tour operators we interviewed mentioned that they now offer more tours to more remote destinations, which means that these destinations won't remain remote for long.

Tips:

Point out the unique aspects of your area. Maybe your local beach is close to an old village rich in history, perhaps it is more remote but it also allows visitors to discover specific flora and fauna; these details are more important nowadays than the beach postcards used in sun and beach tourism promotion in the past.

Seek contact with European tour operators if your sun and beach destination is more remote, since this is definitely a selling point.

Sun and beach tourism more associated with other types of tourism

Travellers are increasingly looking for adventure, as well as experiences that enrich them during the holidays instead of just lying on the beach. Community tourism can be one of these aspects.

Tips:

Show the unique aspects of your place to visitors. For example, offer a tour to a local fishing village and set up a meeting with locals.

Offer adventure activities, such as kayaking, snorkelling, surfing or diving.

Set up a collaboration with destination management companies (DMCs), tour operators or other tourism entrepreneurs.

Growing demand for sustainable holidays

Travellers are increasingly aware of and concerned with sustainability. When they choose a sun and beach holiday destination, it is increasingly influenced by ethics, moral values, concerns about the coastal environment and its ecosystems, including flora and animal protection and a desire to positively impact local communities. These travellers demand affordability and availability of environmentally friendly, sustainable and socially responsible tourism services and products. They want to reduce their holiday carbon footprint, but often want to improve the destination as well. That is why do good, feel good holidays and ecological tours are growing in popularity.

Among the reasons why European governments and travellers have been paying more attention to sustainability include climate change, plastic pollution, air and water pollution, land and water usage, dislocation of traditional societies, the negative impacts of over tourism on host communities, and international agreements, such as the Paris Agreement and the United Nations (UN) Sustainable Development Goals.

Some good sun and beach examples mentioned by UNWTO in their [database of projects that contribute to the UN Sustainable Development Goals](#) include:

- [Chumbe Island Coral Park](#) in Tanzania, which is a protected coral reef sanctuary and forest reserve including an eco-lodge. Tourism is used to fund the conservation costs for a financially and ecologically sustainable park.
- [Mayakoba Tourism Development](#) in Mexico, a tourism city built with the lowest possible impact on the environment. Most of the existing flora and fauna has been preserved, and new habitats for bird, fish and amphibians were created.

Tips:

Study the [UN Sustainable Development Goals](#) to learn more about how to contribute to a sustainable world.

Balance short and long-term priorities and implement a strategy that integrates safeguarding the destination, environmental leadership and community health into the traveller's experience.


Involve customers, for example, in beach clean-ups or 'plogging' (picking up litter while jogging). [The Go Plog! Facebook site](#) offers many examples in developing countries.


Make your assortment more environmentally friendly and get [certified](#) to build trust with potential customers.


This study has been carried out on behalf of CBI by [Molgo](#) and [ETFI](#).

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