

**STUDIES**

**THE EVOLUTION IN HOLIDAY TRAVEL FACILITIES  
AND IN THE FLOW OF TOURISM  
INSIDE AND OUTSIDE THE EUROPEAN COMMUNITY**

**Part II: MAIN REPORT**



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**THE EVOLUTION IN HOLIDAY TRAVEL FACILITIES  
AND IN THE FLOW OF TOURISM  
INSIDE AND OUTSIDE THE  
EUROPEAN COMMUNITY**

**Part II: Main Report**

**1993**

**TOURCONSULT International  
TOURCONSULT Italia  
EUROPEAN TRAVEL DATA CENTRE**

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# 1. QUANTIFICATION OF TRAVELLERS AND NON-TRAVELLERS IN EUROPE

## 1.1 Introduction

In this report, 25 Tables show for 24 European countries and for Europe as a whole the total number of trips made in 1990, whether domestic or international as well as the number of non-travellers.

These trips are broken down by: All travel, Abroad travel, Domestic travel according to age of travellers, and by social, income and educational levels.

These tables give as well the total number of Non-travellers, again broken down by age, social, income and educational levels.

In addition, all outbound trips are broken down into: season of travel, purpose of trip, length of stay, travel organisation and transportation used.

**From this study the Commission of European Communities will obtain - for the first time - an overview of all the tourism flows within the EEC and outside the European Community, an overview of the market of which the EEC is responsible.**

The analysis of these tables which constitute the major contribution of this study, is made throughout the Report.

## 1.2 Contents of the tables

The tables in this chapter provide a summary of the findings of the *European Travel Monitor (ETM)* on total European travel as well as on non-travellers for 24 Selected European countries and for Europe as a whole.

All data were collected by the *European Travel Data Center (ETDC)*, Luxembourg in 1990/91.

Again it has to be pointed out that the data of the European Travel Monitor provided by the European Travel Data Center, Luxembourg have been produced exclusively for the purpose of this EC-Study 409/90

TOURCONSULT/INTERNATIONAL has based the Final Report analysis on the following tables produced by the European Travel Monitor, 1990, referring to European Travel<sup>(\*)</sup>.

The data contained in these tables cover:

- Trips made by the residents aged 15 years and over of 24 countries of Western and Eastern Europe.
- Trips made outside the resident's own country (trips partly in the resident's own country and partly abroad are counted as trips abroad) and made within the resident's own country.
- Trips lasting for at least one away from home and up to three months (not day trips).
- Trips for any purpose such as holiday travel, business travel and travel for other private reasons (but not trips for full-time education or employment).
- All trips completed during the calendar year 1990.

It should be noted that the first part of each table (up to the ..... line) relate to travellers and that the second part of each table relate to trips (not to people).

If one person makes three trips, these are counted three times in the total volume.

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(\*) The questionnaire of the European Travel Monitor will be found in Appendix A at the end of this study.

## **1.3 The use of the European Travel Monitor for the research**

### **1.3.1 Introduction**

The ETDC has been conducting its European Travel Monitor since 1988. This is a comprehensive on-going survey of the pan-European travel market, covering all 18 countries of Western Europe and, since 1990.

The following tables have been produced exclusively for the purposes of this study by the European Travel Data Center (ETDC), Luxembourg. They are based on the European Travel Monitor, which is the only existing comparable source of data on the pan-European travel market. The European Travel Monitor provides, from a single source, a unique quantitative analysis of international travel.

It had long been recognised that, within Europe, the data available on tourism were both incomplete and not directly comparable from country to country. The European Travel Monitor was set up to remedy this situation.

Its most important strength is that it covers all trips of one night or more. That means, it is not just confined to long holidays; it does not overlook the growing number of short holidays and VFR trips (visiting friends and relatives) taken abroad. Neither does it ignore business trips, as many other surveys do, or the many trips taken for a variety of miscellaneous reasons - not pure holidays and primarily to see friends or relations.

Other important characteristics of the European Travel Monitor are the uniform methods in all European countries, the uniform questionnaire in all European countries, continuous interview waves in all major markets at intervals of two months, coverage of 18 West and six East European countries - that means: International comparability for the entire European travel market!

The following tables show, for each of the 24 countries in Europe and Europe overall - the 18 countries of Western Europe: Austria, Belgium, Denmark, Finland, France, Germany, Great Britain, Greece, Iceland, Ireland, Italy, Luxembourg, Netherlands, Norway, Portugal, Spain, Sweden and

Switzerland, plus six countries in Eastern Europe: Bulgaria, Czechoslovakia, Hungary, Poland, Romania and Yugoslavia - the total number of trips made in 1990, whether domestic or international as well as the number of non-travellers.

Please note well that in general, European Travel Monitor results are to be treated as very confidential. European Travel Monitor findings may not be communicated to or given to other people, organizations or the media. With regard to this project it could be that the results (in total) might be published.

This first full survey was carried out in 1988, but only after two years of extensive desk research and piloting to establish the most effective data collection methods.

The following list shows a simple breakdown of the countries of origin which the European Travel Monitor covers:

Western Europe:

- |                   |                 |
|-------------------|-----------------|
| 1. Austria        | 10. Ireland     |
| 2. Belgium        | 11. Italy       |
| 3. Denmark        | 12. Luxembourg  |
| 4. Finland        | 13. Netherlands |
| 5. France         | 14. Norway      |
| 6. Germany (West) | 15. Portugal    |
| 7. Great Britain  | 16. Spain       |
| 8. Greece         | 17. Sweden      |
| 9. Iceland        | 18. Switzerland |

### Eastern Europe

19. Czechoslovakia
20. Germany (East)
21. Hungary
22. Poland
23. Yugoslavia
24. Bulgaria

#### **1.3.2 Method of Data Collection**

The data for the European Travel Monitor are collected by means of regular sample surveys carried out by leading opinion polling institutes in each of the countries covered.

By interviewing people shortly after they have taken a trip instead of, as happens in many tourism surveys, at the end of the year, there is much less chance of minor trips, or some of the trips taken by a frequent traveller, being forgotten.

In those countries where there is a level of telephone ownership of 90% or higher, interviewing is carried out by telephone. In countries with lower levels of telephone ownership, face to face interviewing is carried out.

#### **1.3.3 Time of Data Collection**

In major markets, interviewing is conducted every two months — six times a year. In each "wave" representative samples of 2,000 adults aged 15 years and over are contacted totalling 12,000 contact interviews per country and year. In a number of smaller markets, Greece, Iceland, Luxembourg and Portugal, and in most of Eastern Europe interviewing is less frequent, but in Germany (W), Europe's largest tourism generating country, it is carried out every month producing 36,000 contact interviews per year.

### 1.3.4 Sample Size

Over the year as a whole, contact interviews are carried out with no fewer than 180,000 people.

Those questioned give details of all trips they have taken outside their own country since the previous "wave" of interviewing. In this way, over the year as a whole, the European Travel Monitor obtains details of a representative sample of no fewer than 40,000 trips.

### 1.3.5 Survey Analysis

Overall responsibility for the survey rests with the Board of the European Travel Data Center which developed the methodology used by the European Travel Monitor and maintains constant checks on the quality of the work. Co-ordination and reporting is carried out in Germany by IPK-Munich, an experienced tourism research institute.

The computer tabulation of the data is carried out in London by Numbers Data Processing Ltd., an experienced survey analysis bureau, working to a specification developed by the European Travel Data Center.

### 1.3.6 Information Collected

The European Travel Monitor collects information on the following:

-----

#### *About trips abroad*

- |                         |                         |
|-------------------------|-------------------------|
| - number of trips       | - organisation of trip  |
| - number of nights      | - method of transport   |
| - purpose of trip       | - accommodation         |
| - type of holiday       | - expenditure per trip  |
| - type of business trip | - expenditure per night |
| - destination of trip   | - total travel turnover |
| - season of travel      | - country of origin     |
| - length of stay        | - region of origin      |

-----

*About domestic trips*

- |                    |                              |
|--------------------|------------------------------|
| - number of trips  | - detailed trip data in four |
| - season of travel | countries                    |

-----

*About the trip taker*

- |                 |                             |
|-----------------|-----------------------------|
| - sex           | - size of town of residence |
| - age           | - size of household         |
| - social status | - children in household     |

### **1.3.7 Reports Produced by the European Travel Monitor**

*Outgoing reports* – cover all the trips, to anywhere in the world, originating in one or several or all countries in which the European Travel Monitor is carried out.

*Incoming reports* – cover all trips to a specific destination country, from one, several or all of the countries in which the European Travel Monitor is carried out.

Both Outgoing and Incoming reports are available for either all trips or for a particular market segment (e.g. all business trips or all trips by air).

### **1.3.8 Use of the European Travel Monitor for the Study 409/90**

*Subject*

Working out an overview report comparing the travel intensity 1990 of the 12 member countries of the European Communities to identify those population groups which:

- a) went on a holiday trip;
- b) did not go on a holiday trip (motivations for this)

### *Data base*

Special evaluation of the question on travel intensity of the European Travel Monitor for the 12 member countries of the European Communities.

### *Contents*

- 1) Quantifying the groups within the population which, in 1990,
  - did not go on a holiday trip
  - went only on domestic holiday trips
  - went also on holiday trips abroad
- 2) Description of the respective population groups according to the following social demographic criteria:
 

• sex	• size of household
• age	• children in household
• region	• school education
• size of town residence	• professional/social status
- 3) Ascertaining the trends of the development of travel intensity in each country
- 4) Defining the member countries of the European Communities with the greatest share of "non-holiday makers"  
(motivations: why do they not travel)

### **1.3.9 Notes to the Tables**

Figures used in the accompanying tables are based on grossed up estimates relating to the adult population of European source countries, aged 15 years and older.

This means that the results of each wave of interviewing have been



multiplied by the relevant factor to be representative of the total population aged 15 years and over in each country.

For example: In Great Britain 2,000 people are interviewed in one survey. There are approximately 40 million adults aged 15 years and over. Each trip in the country, therefore, is multiplied by a factor of 20,000:

- If one of the respondents interviewed has made one trip, this trip is grossed up to 20,000 trips.
- If he has made 4 trips, these are grossed up to 80,000 trips.

In some tables the values in a column do not add up to the total shown in the table. There are two reasons for this:

- Rounding Effect: All grossed up estimates/percentages are rounded to the nearest whole number, e.g. 10.4% becomes 10%, 10.5% becomes 11%. As a result the rounded grossed up estimates/percentages may not add up exactly to a total/100%.
- Multiple Answers: For some questions, i.e. traveller's destinations choice or transport used, it was possible to give more than one answer. In these cases, the estimates/percentages may add to considerably more than 100%.

## 1. TOTAL EUROPE

	All Travel	Abroad (1) Travel	Domestic (1) Travel	Non- Traveller
<b>No. of travellers</b>	229.3 mn	98.5 mn	177.4 mn	-
<b>No. of non-travellers</b>	155.4 mn	286.2 mn	207.3 mn	155.4 mn
<b>Age (2)</b>				
- 1st age travellers	40%	44%	40%	32%
- 2nd age travellers	35%	36%	35%	32%
- 3rd age travellers	24%	21%	25%	36%
<b>Social/income/education level</b>				
- upper	22%	29%	21%	10%
- middle	54%	51%	54%	43%
- lower	24%	21%	25%	47%
<hr/>				
<b>No. of trips</b>	1159.6 mn	238.3 mn	925.1 mn	-
<b>Season of travel (3)</b>				
- summer season	-	64%	-	-
- winter season	-	36%	-	-
<b>Purpose of trip</b>				
- leisure	-	85%	-	-
- business	-	15%	-	-
<b>Length of stay</b>				
- short trips	-	29%	-	-
- long trips	-	71%	-	-
- mean length	-	9.1 nights	-	-
<b>Organisation</b>				
- pre-booked	-	63%	-	-
- individual	-	37%	-	-
<b>Transport (4)</b>				
- car	-	45%	-	-
- plane	-	33%	-	-
- coach	-	19%	-	-
- train	-	11%	-	-

### Source:

European Travel Monitor 1990, European Travel Data Center Luxembourg for  
TOURCONSULT/INTERNATIONAL EEC Project 409/90

Deviation from the Total or from 100% are due to rounding or multiple answers

- not available or not applicable

(1) can add up to more than "All Travel" since people can take both

(2) 1st age: 15-34 years; 2nd age: 35-54 years; 3rd age: 55+ years

(3) summer season = May-October; winter season (January-April and November-December)

(4) two answers possible

## 2. AUSTRIA

	All Travel	Abroad (1) Travel	Domestic (1) Travel	Non- Traveller
<b>No. of travellers</b>	3.7 mn	2.6 mn	2.5 mn	-
<b>No. of non-travellers</b>	2.5 mn	3.7 mn	3.8 mn	2.5 mn
<b>Age (2)</b>				
- 1st age travellers	43%	43%	43%	32%
- 2nd age travellers	34%	34%	35%	26%
- 3rd age travellers	23%	23%	21%	42%
<b>Social/income/education level</b>				
- upper	39%	42%	41%	16%
- middle	42%	42%	40%	40%
- lower	19%	15%	19%	44%
<hr/>				
<b>No. of trips</b>	18.7 mn	6.4 mn	12.5 mn	-
<b>Season of travel (3)</b>				
- summer season	-	67%	-	-
- winter season	-	33%	-	-
<b>Purpose of trip</b>				
- leisure	-	83%	-	-
- business	-	17%	-	-
<b>Length of stay</b>				
- short trips	-	35%	-	-
- long trips	-	65%	-	-
- mean length	-	7.7 nights	-	-
<b>Organisation</b>				
- pre-booked	-	56%	-	-
- individual	-	44%	-	-
<b>Transport (4)</b>				
- car	-	48%	-	-
- plane	-	28%	-	-
- coach	-	18%	-	-
- train	-	14%	-	-

**Source:**

European Travel Monitor 1990, European Travel Data Center Luxembourg for  
TOURCONSULT/INTERNATIONAL EEC Project 409/90

Deviation from the Total or from 100% are due to rounding or multiple answers

- not available or not applicable

(1) can add up to more than "All Travel" since people can take both

(2) 1st age: 15-34 years; 2nd age: 35-54 years; 3rd age: 55+ years

(3) summer season = May-October; winter season (January-April and November-December)

(4) two answers possible

### 3. BELGIUM

	All Travel	Abroad (1) Travel	Domestic (1) Travel	Non- Traveller
No. of travellers	5.3 mn	4.3 mn	2.0 mn	-
No. of non-travellers	2.7 mn	3.7 mn	6.0 mn	2.7 mn
<b>Age (2)</b>				
- 1st age travellers	44%	45%	45%	29%
- 2nd age travellers	35%	35%	35%	34%
- 3rd age travellers	21%	20%	21%	37%
<b>Social/income/education LEVEL</b>				
- upper	31%	34%	30%	18%
- middle	54%	51%	56%	51%
- lower	15%	14%	13%	31%
<hr/>				
No. of trips	27.7 mn	16.5 mn	11.3 mn	-
<b>Season of travel (3)</b>				
- summer season	-	60%	-	-
- winter season	-	40%	-	-
<b>Purpose of trip</b>				
- leisure	-	87%	-	-
- business	-	13%	-	-
<b>Length of stay</b>				
- short trips	-	31%	-	-
- long trips	-	69%	-	-
- mean length	-	8.2 nights	-	-
<b>Organisation</b>				
- pre-booked	-	58%	-	-
- individual	-	42%	-	-
<b>Transport (4)</b>				
- car	-	52%	-	-
- plane	-	23%	-	-
- coach	-	14%	-	-
- train	-	9%	-	-

**Source:**

European Travel Monitor 1990, European Travel Data Center Luxembourg for  
TOURCONSULT/INTERNATIONAL EEC Project 409/90

Deviation from the Total or from 100% are due to rounding or multiple answers

- not available or not applicable

(1) can add up to more than "All Travel" since people can take both

(2) 1st age: 15-34 years; 2nd age: 35-54 years; 3rd age: 55+ years

(3) summer season = May-October; winter season (January-April and November-December)

(4) two answers possible

#### 4. BULGARIA

	All Travel	Abroad (1) Travel	Domestic (1) Travel	Non- Traveller
<b>No. of travellers</b>	4.3 mn	0.7 mn	4.2 mn	-
<b>No. of non-travellers</b>	3.1 mn	6.7 mn	3.2 mn	3.1 mn
<b>Age (2)</b>				
- 1st age travellers	47%	53%	47%	28%
- 2nd age travellers	36%	37%	36%	26%
- 3rd age travellers	17%	10%	17%	46%
<b>Social/income/education level</b>				
- upper	18%	23%	19%	6%
- middle	62%	64%	62%	41%
- lower	20%	13%	20%	53%
<hr/>				
<b>No. of trips</b>	47.4 mn	1.5 mn	45.9 mn	-
<b>Season of travel (3)</b>				
- summer season	-	58%	-	-
- winter season	-	42%	-	-
<b>Purpose of trip</b>				
- leisure	-	72%	-	-
- business	-	28%	-	-
<b>Length of stay</b>				
- short trips	-	40%	-	-
- long trips	-	60%	-	-
- mean length	-	9.1 nights	-	-
<b>Organisation</b>				
- pre-booked	-	62%	-	-
- individual	-	38%	-	-
<b>Transport (4)</b>				
- car	-	45%	-	-
- plane	-	24%	-	-
- coach	-	20%	-	-
- train	-	18%	-	-

**Source:**

European Travel Monitor 1990, European Travel Data Center Luxembourg for  
TOURCONSULT/INTERNATIONAL EEC Project 409/90

Deviation from the Total or from 100% are due to rounding or multiple answers

- not available or not applicable

(1) can add up to more than "All Travel" since people can take both

(2) 1st age: 15-34 years; 2nd age: 35-54 years; 3rd age: 55+ years

(3) summer season = May-October; winter season (January-April and November-December)

(4) two answers possible

## 5. CZECHOSLOVAKIA

	All Travel	Abroad (1) Travel	Domestic (1) Travel	Non- Traveller
No. of travellers	4.8 mn	2.8 mn	4.2 mn	-
No. of non-travellers	6.8 mn	8.9 mn	7.5 mn	6.8 mn
<b>Age (2)</b>				
- 1st age travellers	41%	41%	43%	33%
- 2nd age travellers	39%	43%	39%	35%
- 3rd age travellers	20%	16%	19%	32%
<b>Social/income/education level</b>				
- upper	14%	17%	14%	5%
- middle	32%	35%	31%	19%
- lower	55%	47%	55%	75%
<hr/>				
No. of trips	28.3 mn	5.7 mn	22.5 mn	-
<b>Season of travel (3)</b>				
- summer season	-	82%	-	-
- winter season	-	18%	-	-
<b>Purpose of trip</b>				
- leisure	-	82%	-	-
- business	-	18%	-	-
<b>Length of stay</b>				
- short trips	-	61%	-	-
- long trips	-	39%	-	-
- mean length	-	4.9 nights	-	-
<b>Organisation</b>				
- pre-booked	-	64%	-	-
- individual	-	36%	-	-
<b>Transport (4)</b>				
- car	-	41%	-	-
- plane	-	4%	-	-
- coach	-	42%	-	-
- train	-	14%	-	-

### Source:

European Travel Monitor 1990, European Travel Data Center Luxembourg for  
TOURCONSULT/INTERNATIONAL EEC Project 409/90

Deviation from the Total or from 100% are due to rounding or multiple answers

- not available or not applicable

(1) can add up to more than "All Travel" since people can take both

(2) 1st age: 15-34 years; 2nd age: 35-54 years; 3rd age: 55+ years

(3) summer season = May-October; winter season (January-April and November-December)

(4) two answers possible

## 6. DENMARK

	All Travel	Abroad (1) Travel	Domestic (1) Travel	Non- Traveller
<b>No. of travellers</b>	2.6 mn	1.8 mn	1.5 mn	-
<b>No. of non-travellers</b>	1.6 mn	2.4 mn	2.7 mn	1.6 mn
<b>Age (2)</b>				
- 1st age travellers	40%	41%	40%	32%
- 2nd age travellers	36%	36%	37%	26%
- 3rd age travellers	25%	23%	23%	41%
<b>Social/income/education level</b>				
- upper	39%	42%	39%	-
- middle	34%	35%	35%	-
- lower	27%	23%	26%	-
<hr/>				
<b>No. of trips</b>	20.9 mn	5.9 mn	15.1 mn	-
<b>Season of travel (3)</b>				
- summer season	-	57%	-	-
- winter season	-	43%	-	-
<b>Purpose of trip</b>				
- leisure	-	72%	-	-
- business	-	28%	-	-
<b>Length of stay</b>				
- short trips	-	25%	-	-
- long trips	-	75%	-	-
- mean length	-	7.2 nights	-	-
<b>Organisation</b>				
- pre-booked	-	75%	-	-
- individual	-	25%	-	-
<b>Transport (4)</b>				
- car	-	37%	-	-
- plane	-	38%	-	-
- coach	-	15%	-	-
- train	-	12%	-	-

**Source:**

European Travel Monitor 1990, European Travel Data Center Luxembourg for  
TOURCONSULT/INTERNATIONAL EEC Project 409/90

Deviation from the Total or from 100% are due to rounding or multiple answers

- not available or not applicable

(1) can add up to more than "All Travel" since people can take both

(2) 1st age: 15-34 years; 2nd age: 35-54 years; 3rd age: 55+ years

(3) summer season = May-October; winter season (January-April and November-December)

(4) two answers possible

## 7. FINLAND

	All Travel	Abroad (1) Travel	Domestic (1) Travel	Non- Traveller
<b>No. of travellers</b>	3.3 mn	2.0 mn	2.7 mn	-
<b>No. of non-travellers</b>	0.7 mn	2.0 mn	1.3 mn	0.7 mn
<b>Age (2)</b>				
- 1st age travellers	42%	42%	42%	31%
- 2nd age travellers	34%	38%	34%	20%
- 3rd age travellers	24%	20%	24%	49%
<b>Social/income/education level</b>				
- upper	42%	51%	43%	16%
- middle	33%	28%	32%	32%
- lower	25%	21%	25%	51%
<hr/>				
<b>No. of trips</b>	31.1 mn	4.2 mn	26.9 mn	-
<b>Season of travel (3)</b>				
- summer season	-	62%	-	-
- winter season	-	38%	-	-
<b>Purpose of trip</b>				
- leisure	-	80%	-	-
- business	-	20%	-	-
<b>Length of stay</b>				
- short trips	-	43%	-	-
- long trips	-	57%	-	-
- mean length	-	6.2 nights	-	-
<b>Organisation</b>				
- pre-booked	-	88%	-	-
- individual	-	12%	-	-
<b>Transport (4)</b>				
- car	-	15%	-	-
- plane	-	54%	-	-
- coach	-	12%	-	-
- train	-	6%	-	-

**Source:**

European Travel Monitor 1990, European Travel Data Center Luxembourg for  
TOURCONSULT/INTERNATIONAL EEC Project 409/90

Deviation from the Total or from 100% are due to rounding or multiple answers

- not available or not applicable

(1) can add up to more than "All Travel" since people can take both

(2) 1st age: 15-34 years; 2nd age: 35-54 years; 3rd age: 55+ years

(3) summer season = May-October; winter season (January-April and November-December)

(4) two answers possible



## 8. FRANCE

	All Travel	Abroad (1) Travel	Domestic (1) Travel	Non- Traveller
<b>No. of travellers</b>	<b>24.8 mn</b>	<b>8.5 mn</b>	<b>20.6 mn</b>	<b>-</b>
<b>No. of non-travellers</b>	<b>18.3 mn</b>	<b>34.6 mn</b>	<b>22.5 mn</b>	<b>18.3 mn</b>
<b>Age (2)</b>				
- 1st age travellers	33%	35%	32%	22%
- 2nd age travellers	38%	38%	39%	30%
- 3rd age travellers	29%	28%	29%	48%
<b>Social/income/education level</b>				
- upper	22%	29%	23%	6%
- middle	53%	45%	54%	42%
- lower	25%	26%	23%	51%
<hr/>				
<b>No. of trips</b>	<b>99.2 mn</b>	<b>14.8 mn</b>	<b>84.6 mn</b>	<b>-</b>
<b>Season of travel (3)</b>				
- summer season	-	62%	-	-
- winter season	-	38%	-	-
<b>Purpose of trip</b>				
- leisure	-	83%	-	-
- business	-	17%	-	-
<b>Length of stay</b>				
- short trips	-	22%	-	-
- long trips	-	78%	-	-
- mean length	-	11.1 nights	-	-
<b>Organisation</b>				
- pre-booked	-	69%	-	-
- individual	-	31%	-	-
<b>Transport (4)</b>				
- car	-	38%	-	-
- plane	-	49%	-	-
- coach	-	18%	-	-
- train	-	13%	-	-

**Source:**

European Travel Monitor 1990, European Travel Data Center Luxembourg for  
TOURCONSULT/INTERNATIONAL EEC Project 409/90

Deviation from the Total or from 100% are due to rounding or multiple answers  
- not available or not applicable

(1) can add up to more than "All Travel" since people can take both

(2) 1st age: 15-34 years; 2nd age: 35-54 years; 3rd age: 55+ years

(3) summer season = May-October; winter season (January-April and November-December)

(4) two answers possible

## 9. GERMANY (WEST + EAST)

	All Travel	Abroad (1) Travel	Domestic (1) Travel	Non- Traveller
No. of travellers	42.0 mn	23.0 mn	24.8 mn	-
No. of non-travellers	20.2 mn	39.2 mn	37.4 mn	20.2 mn
<b>Age (2)</b>				
- 1st age travellers	38%	44%	34%	31%
- 2nd age travellers	35%	36%	35%	26%
- 3rd age travellers	27%	20%	31%	43%
<b>Social/income/education level</b>				
- upper	31%	34%	32%	13%
- middle	50%	48%	50%	48%
- lower	18%	18%	18%	39%
<hr/>				
No. of trips	205.5 mn	65.2 mn	140.3 mn	-
<b>Season of travel (3)</b>				
- summer season	-	70%	-	-
- winter season	-	30%	-	-
<b>Purpose of trip</b>				
- leisure	-	92%	-	-
- business	-	8%	-	-
<b>Length of stay</b>				
- short trips	-	22%	-	-
- long trips	-	78%	-	-
- mean length	-	10.0 nights	-	-
<b>Organisation</b>				
- pre-booked	-	56%	-	-
- individual	-	44%	-	-
<b>Transport (4)</b>				
- car	-	55%	-	-
- plane	-	27%	-	-
- coach	-	25%	-	-
- train	-	11%	-	-

### Source:

European Travel Monitor 1990, European Travel Data Center Luxembourg for  
TOURCONSULT/INTERNATIONAL EEC Project 409/90

Deviation from the Total or from 100% are due to rounding or multiple answers

- not available or not applicable

(1) can add up to more than "All Travel" since people can take both

(2) 1st age: 15-34 years; 2nd age: 35-54 years; 3rd age: 55+ years

(3) summer season = May-October; winter season (January-April and November-December)

(4) two answers possible

## 10. GREAT BRITAIN

	All Travel	Abroad (1) Travel	Domestic (1) Travel	Non- Traveller
<b>No. of travellers</b>	30.2 mn	12.5 mn	23.9 mn	-
<b>No. of non-travellers</b>	14.8 mn	32.6 mn	21.2 mn	14.8 mn
<b>Age (2)</b>				
- 1st age travellers	38%	42%	35%	37%
- 2nd age travellers	32%	30%	34%	26%
- 3rd age travellers	30%	28%	30%	36%
<b>Social/income/education level</b>				
- upper	20%	28%	21%	6%
- middle	58%	56%	58%	51%
- lower	21%	16%	21%	43%
<hr/>				
<b>No. of trips</b>	120.8 mn	26.7 mn	95.5 mn	-
<b>Season of travel (3)</b>				
- summer season	-	57%	-	-
- winter season	-	43%	-	-
<b>Purpose of trip</b>				
- leisure	-	86%	-	-
- business	-	14%	-	-
<b>Length of stay</b>				
- short trips	-	16%	-	-
- long trips	-	84%	-	-
- mean length	-	10.9 nights	-	-
<b>Organisation</b>				
- pre-booked	-	91%	-	-
- individual	-	9%	-	-
<b>Transport (4)</b>				
- car	-	25%	-	-
- plane	-	67%	-	-
- coach	-	14%	-	-
- train	-	5%	-	-

**Source:**

European Travel Monitor 1990, European Travel Data Center Luxembourg for  
TOURCONSULT/INTERNATIONAL EEC Project 409/90

Deviation from the Total or from 100% are due to rounding or multiple answers

- not available or not applicable

(1) can add up to more than "All Travel" since people can take both

(2) 1st age: 15-34 years; 2nd age: 35-54 years; 3rd age: 55+ years

(3) summer season = May-October; winter season (January-April and November-December)

(4) two answers possible

## 11. GREECE

	All Travel	Abroad (1) Travel	Domestic (1) Travel	Non- Traveller
<b>No. of travellers</b>	4.6 mn	1.1 mn	4.2 mn	-
<b>No. of non-travellers</b>	3.5 mn	7.0 mn	3.9 mn	3.5 mn
<b>Age (2)</b>				
- 1st age travellers	48%	42%	49%	36%
- 2nd age travellers	40%	48%	40%	40%
- 3rd age travellers	11%	11%	11%	24%
<b>Social/income/education level</b>				
- upper	39%	49%	40%	17%
- middle	41%	39%	41%	34%
- lower	20%	12%	19%	49%
<hr/>				
<b>No. of trips</b>	23.3 mn	2.3 mn	21.2 mn	-
<b>Season of travel (3)</b>				
- summer season	-	53%	-	-
- winter season	-	47%	-	-
<b>Purpose of trip</b>				
- leisure	-	66%	-	-
- business	-	34%	-	-
<b>Length of stay</b>				
- short trips	-	19%	-	-
- long trips	-	81%	-	-
- mean length	-	10.6 nights	-	-
<b>Organisation</b>				
- pre-booked	-	76%	-	-
- individual	-	24%	-	-
<b>Transport (4)</b>				
- car	-	18%	-	-
- plane	-	54%	-	-
- coach	-	23%	-	-
- train	-	5%	-	-

**Source:**

European Travel Monitor 1990, European Travel Data Center Luxembourg for  
TOURCONSULT/INTERNATIONAL EEC Project 409/90

Deviation from the Total or from 100% are due to rounding or multiple answers

- not available or not applicable

(1) can add up to more than "All Travel" since people can take both

(2) 1st age: 15-34 years; 2nd age: 35-54 years; 3rd age: 55+ years

(3) summer season = May-October; winter season (January-April and November-December)

(4) two answers possible

## 12. HUNGARY

	All Travel	Abroad (1) Travel	Domestic (1) Travel	Non- Traveller
<b>No. of travellers</b>	2.6 mn	1.4 mn	2.0 mn	-
<b>No. of non-travellers</b>	5.6 mn	6.8 mn	6.2 mn	5.6 mn
<b>Age (2)</b>				
- 1st age travellers	46%	46%	48%	27%
- 2nd age travellers	35%	38%	33%	35%
- 3rd age travellers	19%	16%	19%	37%
<b>Social/income/education level</b>				
- upper	51%	59%	48%	23%
- middle	37%	33%	38%	40%
- lower	13%	8%	14%	37%
<hr/>				
<b>No. of trips</b>	16.6 mn	6.0 mn	10.6 mn	-
<b>Season of travel (3)</b>				
- summer season	-	80%	-	-
- winter season	-	20%	-	-
<b>Purpose of trip</b>				
- leisure	-	77%	-	-
- business	-	23%	-	-
<b>Length of stay</b>				
- short trips	-	48%	-	-
- long trips	-	52%	-	-
- mean length	-	6.1 nights	-	-
<b>Organisation</b>				
- pre-booked	-	50%	-	-
- individual	-	50%	-	-
<b>Transport (4)</b>				
- car	-	55%	-	-
- plane	-	7%	-	-
- coach	-	29%	-	-
- train	-	10%	-	-

**Source:**

European Travel Monitor 1990, European Travel Data Center Luxembourg for  
TOURCONSULT/INTERNATIONAL EEC Project 409/90

Deviation from the Total or from 100% are due to rounding or multiple answers

- not available or not applicable

(1) can add up to more than "All Travel" since people can take both

(2) 1st age: 15-34 years; 2nd age: 35-54 years; 3rd age: 55+ years

(3) summer season = May-October; winter season (January-April and November-December)

(4) two answers possible

### 13. ICELAND

	All Travel	Abroad (1) Travel	Domestic (1) Travel	Non- Traveller
<b>No. of travellers</b>	0.2 mn	0.1 mn	0.2 mn	-
<b>No. of non-travellers</b>	0.0 mn	0.1 mn	0.0 mn	0.0 mn
<b>Age (2)</b>				
- 1st age travellers	47%	44%	46%	50%
- 2nd age travellers	35%	41%	35%	29%
- 3rd age travellers	18%	15%	19%	21%
<b>Social/income/education level</b>				
- upper	12%	17%	12%	13%
- middle	47%	48%	47%	46%
- lower	41%	35%	41%	42%
<hr/>				
<b>No. of trips</b>	0.9 mn	0.1 mn	0.8 mn	-
<b>Season of travel (3)</b>				
- summer season	-	64%	-	-
- winter season	-	36%	-	-
<b>Purpose of trip</b>				
- leisure	-	75%	-	-
- business	-	25%	-	-
<b>Length of stay</b>				
- short trips	-	11%	-	-
- long trips	-	89%	-	-
- mean length	-	14.4 nights	-	-
<b>Organisation</b>				
- pre-booked	-	86%	-	-
- individual	-	14%	-	-
<b>Transport (4)</b>				
- car	-	7%	-	-
- plane	-	96%	-	-
- coach	-	6%	-	-
- train	-	6%	-	-

**Source:**

European Travel Monitor 1990, European Travel Data Center Luxembourg for  
TOURCONSULT/INTERNATIONAL EEC Project 409/90

Deviation from the Total or from 100% are due to rounding or multiple answers

- not available or not applicable

(1) can add up to more than "All Travel" since people can take both

(2) 1st age: 15-34 years; 2nd age: 35-54 years; 3rd age: 55+ years

(3) summer season = May-October; winter season (January-April and November-December)

(4) two answers possible

## 14. IRELAND

	All Travel	Abroad (1) Travel	Domestic (1) Travel	Non- Traveller
No. of travellers	1.6 mn	0.8 mn	1.2 mn	-
No. of non-travellers	1.0 mn	1.7 mn	1.3 mn	1.0 mn
<b>Age (2)</b>				
- 1st age travellers	47%	45%	48%	35%
- 2nd age travellers	30%	32%	30%	30%
- 3rd age travellers	23%	23%	22%	35%
<b>Social/income/education level</b>				
- upper	15%	18%	16%	4%
- middle	58%	59%	59%	46%
- lower	27%	23%	25%	50%
<hr/>				
No. of trips	5.4 mn	1.2 mn	4.2 mn	-
<b>Season of travel (3)</b>				
- summer season	-	76%	-	-
- winter season	-	24%	-	-
<b>Purpose of trip</b>				
- leisure	-	88%	-	-
- business	-	12%	-	-
<b>Length of stay</b>				
- short trips	-	16%	-	-
- long trips	-	84%	-	-
- mean length	-	11.7 nights	-	-
<b>Organisation</b>				
- pre-booked	-	91%	-	-
- individual	-	9%	-	-
<b>Transport (4)</b>				
- car	-	14%	-	-
- plane	-	73%	-	-
- coach	-	8%	-	-
- train	-	4%	-	-

### Source:

European Travel Monitor 1990, European Travel Data Center Luxembourg for  
TOURCONSULT/INTERNATIONAL EEC Project 409/90

Deviation from the Total or from 100% are due to rounding or multiple answers

- not available or not applicable

(1) can add up to more than "All Travel" since people can take both

(2) 1st age: 15-34 years; 2nd age: 35-54 years; 3rd age: 55+ years

(3) summer season = May-October; winter season (January-April and November-December)

(4) two answers possible

## 15. ITALY

	All Travel	Abroad (1) Travel	Domestic (1) Travel	Non- Traveller
<b>No. of travellers</b>	28,9 mn	7,5 mn	26,3 mn	-
<b>No. of non-travellers</b>	18.7 mn	40.1 mn	21.3 mn	18.7 mn
<b>Age (2)</b>				
- 1st age travellers	41%	50%	41%	27%
- 2nd age travellers	36%	34%	37%	33%
- 3rd age travellers	23%	15%	23%	40%
<b>Social/income/education level</b>				
- upper	9%	12%	9%	3%
- middle	69%	69%	69%	59%
- lower	22%	19%	22%	38%
<hr/>				
<b>No. of trips</b>	104,0 mn	13,4 mn	92,0 mn	-
<b>Season of travel (3)</b>				
- summer season	-	58%	-	-
- winter season	-	42%	-	-
<b>Purpose of trip</b>				
- leisure	-	86%	-	-
- business	-	14%	-	-
<b>Length of stay</b>				
- short trips	-	25%	-	-
- long trips	-	75%	-	-
- mean length	-	9.3 nights	-	-
<b>Organisation</b>				
- pre-booked	-	65%	-	-
- individual	-	35%	-	-
<b>Transport (4)</b>				
- car	-	44%	-	-
- plane	-	31%	-	-
- coach	-	15%	-	-
- train	-	12%	-	-

**Source:**

European Travel Monitor 1990, European Travel Data Center Luxembourg for  
TOURCONSULT /INTERNATIONAL EEC Project 409/90

Deviation from the Total or from 100% are due to rounding or multiple answers

- not available or not applicable

(1) can add up to more than "All Travel" since people can take both

(2) 1st age: 15-34 years; 2nd age: 35-54 years; 3rd age: 55+ years

(3) summer season = May-October; winter season (January-April and November-December)

(4) two answers possible



## 16. LUXEMBOURG

	All Travel	Abroad (1) Travel	Domestic (1) Travel	Non- Traveller
<b>No. of travellers</b>	0.2 mn	0.2 mn	0.0 mn	-
<b>No. of non-travellers</b>	0.1 mn	0.1 mn	0.3 mn	0.1 mn
<b>Age (2)</b>				
- 1st age travellers	37%	36%	36%	32%
- 2nd age travellers	34%	34%	33%	29%
- 3rd age travellers	30%	29%	30%	39%
<b>Social/income/education level</b>				
- upper	31%	31%	24%	23%
- middle	56%	57%	58%	60%
- lower	13%	12%	18%	17%
<hr/>				
<b>No. of trips</b>	0.6 mn	0.4 mn	0.1 mn	-
<b>Season of travel (3)</b>				
- summer season	-	76%	-	-
- winter season	-	24%	-	-
<b>Purpose of trip</b>				
- leisure	-	90%	-	-
- business	-	10%	-	-
<b>Length of stay</b>				
- short trips	-	18%	-	-
- long trips	-	82%	-	-
- mean length	-	10.7 nights	-	-
<b>Organisation</b>				
- pre-booked	-	56%	-	-
- individual	-	44%	-	-
<b>Transport (4)</b>				
- car	-	62%	-	-
- plane	-	12%	-	-
- coach	-	19%	-	-
- train	-	7%	-	-

**Source:**

European Travel Monitor 1990, European Travel Data Center Luxembourg for  
TOURCONSULT/INTERNATIONAL EEC Project 409/90

Deviation from the Total or from 100% are due to rounding or multiple answers

- not available or not applicable

(1) can add up to more than "All Travel" since people can take both

(2) 1st age: 15-34 years; 2nd age: 35-54 years; 3rd age: 55+ years

(3) summer season = May-October; winter season (January-April and November-December)

(4) two answers possible

## 17. NETHERLANDS

	All Travel	Abroad (1) Travel	Domestic (1) Travel	Non- Traveller
<b>No. of travellers</b>	8.4 mn	6.1 mn	4.5 mn	-
<b>No. of non-travellers</b>	3.0 mn	5.4 mn	7.0 mn	3.0 mn
<b>Age (2)</b>				
- 1st age travellers	45%	46%	44%	31%
- 2nd age travellers	33%	34%	32%	31%
- 3rd age travellers	22%	20%	25%	38%
<b>Social/income/education level</b>				
- upper	29%	32%	29%	13%
- middle	36%	38%	34%	29%
- lower	35%	31%	37%	58%
<hr/>				
<b>No. of trips</b>	52.3 mn	16.7 mn	35.9 mn	-
<b>Season of travel (3)</b>				
- summer season	-	63%	-	-
- winter season	-	37%	-	-
<b>Purpose of trip</b>				
- leisure	-	84%	-	-
- business	-	16%	-	-
<b>Length of stay</b>				
- short trips	-	27%	-	-
- long trips	-	73%	-	-
- mean length	-	10.0 nights	-	-
<b>Organisation</b>				
- pre-booked	-	49%	-	-
- individual	-	51%	-	-
<b>Transport (4)</b>				
- car	-	59%	-	-
- plane	-	24%	-	-
- coach	-	13%	-	-
- train	-	9%	-	-

**Source:**

European Travel Monitor 1990, European Travel Data Center Luxembourg for  
TOURCONSULT/INTERNATIONAL EEC Project 409/90

Deviation from the Total or from 100% are due to rounding or multiple answers

- not available or not applicable

(1) can add up to more than "All Travel" since people can take both

(2) 1st age: 15-34 years; 2nd age: 35-54 years; 3rd age: 55+ years

(3) summer season = May-October; winter season (January-April and November-December)

(4) two answers possible

## 18. NORWAY

	All Travel	Abroad (1) Travel	Domestic (1) Travel	Non- Traveller
<b>No. of travellers</b>	2.6 mn	1.4 mn	2.3 mn	-
<b>No. of non-travellers</b>	0.7 mn	1.9 mn	1.0 mn	0.7 mn
<b>Age (2)</b>				
- 1st age travellers	41%	43%	40%	28%
- 2nd age travellers	31%	34%	32%	24%
- 3rd age travellers	28%	23%	28%	49%
<b>Social/income/education level</b>				
- upper	22%	29%	23%	9%
- middle	48%	49%	48%	39%
- lower	30%	23%	29%	52%
<hr/>				
<b>No. of trips</b>	22.1 mn	3.9 mn	18.2 mn	-
<b>Season of travel (3)</b>				
- summer season	-	62%	-	-
- winter season	-	38%	-	-
<b>Purpose of trip</b>				
- leisure	-	74%	-	-
- business	-	26%	-	-
<b>Length of stay</b>				
- short trips	-	47%	-	-
- long trips	-	53%	-	-
- mean length	-	6.0 nights	-	-
<b>Organisation</b>				
- pre-booked	-	81%	-	-
- individual	-	19%	-	-
<b>Transport (4)</b>				
- car	-	31%	-	-
- plane	-	44%	-	-
- coach	-	9%	-	-
- train	-	5%	-	-

**Source:**

European Travel Monitor 1990, European Travel Data Center Luxembourg for  
TOURCONSULT/INTERNATIONAL EEC Project 409/90

Deviation from the Total or from 100% are due to rounding or multiple answers

- not available or not applicable

(1) can add up to more than "All Travel" since people can take both

(2) 1st age: 15-34 years; 2nd age: 35-54 years; 3rd age: 55+ years

(3) summer season = May-October; winter season (January-April and November-December)

(4) two answers possible

## 19. POLAND

	All Travel	Abroad (1) Travel	Domestic (1) Travel	Non- Traveller
<b>No. of travellers</b>	6.2 mn	2.3 mn	5.7 mn	-
<b>No. of non-travellers</b>	21.9 mn	25.8 mn	22.4 mn	21.9 mn
<b>Age (2)</b>				
- 1st age travellers	48%	47%	49%	35%
- 2nd age travellers	35%	36%	35%	35%
- 3rd age travellers	18%	17%	16%	30%
<b>Social/income/education level</b>				
- upper	33%	34%	33%	18%
- middle	34%	34%	34%	38%
- lower	32%	32%	33%	44%
<hr/>				
<b>No. of trips</b>	29.2 mn	6.4 mn	22.8 mn	-
<b>Season of travel (3)</b>				
- summer season	-	70%	-	-
- winter season	-	30%	-	-
<b>Purpose of trip</b>				
- leisure	-	81%	-	-
- business	-	19%	-	-
<b>Length of stay</b>				
- short trips	-	36%	-	-
- long trips	-	64%	-	-
- mean length	-	9.4 nights	-	-
<b>Organisation</b>				
- pre-booked	-	51%	-	-
- individual	-	49%	-	-
<b>Transport (4)</b>				
- car	-	34%	-	-
- plane	-	11%	-	-
- coach	-	28%	-	-
- train	-	33%	-	-

**Source:**

European Travel Monitor 1990, European Travel Data Center Luxembourg for  
TOURCONSULT/INTERNATIONAL EEC Project 409/90

Deviation from the Total or from 100% are due to rounding or multiple answers

- not available or not applicable

(1) can add up to more than "All Travel" since people can take both

(2) 1st age: 15-34 years; 2nd age: 35-54 years; 3rd age: 55+ years

(3) summer season = May-October; winter season (January-April and November-December)

(4) two answers possible

## 20. PORTUGAL

	All Travel	Abroad (1) Travel	Domestic (1) Travel	Non- Traveller
<b>No. of travellers</b>	3.3 mn	0.8 mn	3.2 mn	-
<b>No. of non-travellers</b>	3.1 mn	5.6 mn	3.2 mn	3.1 mn
<b>Age (2)</b>				
- 1st age travellers	46%	50%	46%	35%
- 2nd age travellers	34%	36%	34%	32%
- 3rd age travellers	20%	15%	21%	33%
<b>Social/income/education level</b>				
- upper	11%	22%	11%	1%
- middle	25%	33%	35%	11%
- lower	63%	45%	63%	88%
<hr/>				
<b>No. of trips</b>	17.3 mn	1.8 mn	15.5 mn	-
<b>Season of travel (3)</b>				
- summer season	-	60%	-	-
- winter season	-	36%	-	-
<b>Purpose of trip</b>				
- leisure	-	79%	-	-
- business	-	21%	-	-
<b>Length of stay</b>				
- short trips	-	36%	-	-
- long trips	-	64%	-	-
- mean length	-	9.8 nights	-	-
<b>Organisation</b>				
- pre-booked	-	43%	-	-
- individual	-	57%	-	-
<b>Transport (4)</b>				
- car	-	45%	-	-
- plane	-	28%	-	-
- coach	-	24%	-	-
- train	-	8%	-	-

**Source:**

European Travel Monitor 1990, European Travel Data Center Luxembourg for  
TOURCONSULT/INTERNATIONAL EEC Project 409/90

Deviation from the Total or from 100% are due to rounding or multiple answers

- not available or not applicable

(1) can add up to more than "All Travel" since people can take both

(2) 1st age: 15-34 years; 2nd age: 35-54 years; 3rd age: 55+ years

(3) summer season = May-October; winter season (January-April and November-December)

(4) two answers possible

## 21. ROMANIA

	All Travel	Abroad (1) Travel	Domestic (1) Travel	Non- Traveller
<b>No. of travellers</b>	6.3 mn	2.6 mn	5.8 mn	-
<b>No. of non-travellers</b>	11.1 mn	14.9 mn	11.7 mn	11.1 mn
<b>Age (2)</b>				
- 1st age travellers	39%	39%	43%	30%
- 2nd age travellers	33%	34%	33%	33%
- 3rd age travellers	28%	28%	24%	38%
<b>Social/income/education level</b>				
- upper	89%	87%	88%	96%
- middle	5%	6%	6%	2%
- lower	5%	7%	6%	2%
<hr/>				
<b>No. of trips</b>	39.4 mn	5.8 mn	33.6 mn	-
<b>Season of travel (3)</b>				
- summer season	-	70%	-	-
- winter season	-	30%	-	-
<b>Purpose of trip</b>				
- leisure	-	79%	-	-
- business	-	21%	-	-
<b>Length of stay</b>				
- short trips	-	57%	-	-
- long trips	-	43%	-	-
- mean length	-	5.7 nights	-	-
<b>Organisation</b>				
- pre-booked	-	51%	-	-
- individual	-	49%	-	-
<b>Transport (4)</b>				
- car	-	53%	-	-
- plane	-	5%	-	-
- coach	-	21%	-	-
- train	-	22%	-	-

**Source:**

European Travel Monitor 1990, European Travel Data Center Luxembourg for  
TOURCONSULT/INTERNATIONAL EEC Project 409/90

Deviation from the Total or from 100% are due to rounding or multiple answers

- not available or not applicable

(1) can add up to more than "All Travel" since people can take both

(2) 1st age: 15-34 years; 2nd age: 35-54 years; 3rd age: 55+ years

(3) summer season = May-October; winter season (January-April and November-December)

(4) two answers possible

## 22. SPAIN

	All Travel	Abroad (1) Travel	Domestic (1) Travel	Non- Traveller
<b>No. of travellers</b>	22.9 mn	4.3 mn	21.8 mn	-
<b>No. of non-travellers</b>	7.1 mn	25.7 mn	8.2 mn	7.1 mn
<b>Age (2)</b>				
- 1st age travellers	46%	56%	45%	29%
- 2nd age travellers	29%	32%	29%	31%
- 3rd age travellers	25%	12%	25%	41%
<b>Social/income/education level</b>				
- upper	15%	24%	15%	16%
- middle	55%	60%	55%	37%
- lower	30%	16%	30%	47%
<hr/>				
<b>No. of trips</b>	115.2 mn	7.2 mn	108.1 mn	-
<b>Season of travel (3)</b>				
- summer season	-	54%	-	-
- winter season	-	46%	-	-
<b>Purpose of trip</b>				
- leisure	-	81%	-	-
- business	-	19%	-	-
<b>Length of stay</b>				
- short trips	-	32%	-	-
- long trips	-	68%	-	-
- mean length	-	8.7 nights	-	-
<b>Organisation</b>				
- pre-booked	-	55%	-	-
- individual	-	45%	-	-
<b>Transport (4)</b>				
- car	-	35%	-	-
- plane	-	35%	-	-
- coach	-	25%	-	-
- train	-	8%	-	-

**Source:**

European Travel Monitor 1990, European Travel Data Center Luxembourg for  
TOURCONSULT/INTERNATIONAL EEC Project 409/90

Deviation from the Total or from 100% are due to rounding or multiple answers

- not available or not applicable

(1) can add up to more than "All Travel" since people can take both

(2) 1st age: 15-34 years; 2nd age: 35-54 years; 3rd age: 55+ years

(3) summer season = May-October; winter season (January-April and November-December)

(4) two answers possible

## 23. SWEDEN

	All Travel	Abroad (1) Travel	Domestic (1) Travel	Non- Traveller
<b>No. of travellers</b>	5.6 mn	3.3 mn	3.9 mn	-
<b>No. of non-travellers</b>	1.4 mn	3.7 mn	3.1 mn	1.4 mn
<b>Age (2)</b>				
- 1st age travellers	29%	30%	27%	26%
- 2nd age travellers	44%	45%	48%	23%
- 3rd age travellers	26%	24%	25%	50%
<b>Social/income/education level</b>				
- upper	9%	13%	11%	3%
- middle	75%	73%	74%	54%
- lower	17%	15%	15%	44%
<hr/>				
<b>No. of trips</b>	72.2 mn	10.8 mn	61.4 mn	-
<b>Season of travel (3)</b>				
- summer season	-	57%	-	-
- winter season	-	43%	-	-
<b>Purpose of trip</b>				
- leisure	-	70%	-	-
- business	-	30%	-	-
<b>Length of stay</b>				
- short trips	-	42%	-	-
- long trips	-	58%	-	-
- mean length	-	6.8 nights	-	-
<b>Organisation</b>				
- pre-booked	-	83%	-	-
- individual	-	17%	-	-
<b>Transport (4)</b>				
- car	-	33%	-	-
- plane	-	44%	-	-
- coach	-	10%	-	-
- train	-	5%	-	-

**Source:**

European Travel Monitor 1990, European Travel Data Center Luxembourg for  
TOURCONSULT/INTERNATIONAL EEC Project 409/90

Deviation from the Total or from 100% are due to rounding or multiple answers

- not available or not applicable

(1) can add up to more than "All Travel" since people can take both

(2) 1st age: 15-34 years; 2nd age: 35-54 years; 3rd age: 55+ years

(3) summer season = May-October; winter season (January-April and November-December)

(4) two answers possible



## 24. SWITZERLAND

	All Travel	Abroad (1) Travel	Domestic (1) Travel	Non- Traveller
<b>No. of travellers</b>	3.8 mn	2.7 mn	1.8 mn	-
<b>No. of non-travellers</b>	1.3 mn	2.4 mn	3.3 mn	1.3 mn
<b>Age (2)</b>				
- 1st age travellers	39%	40%	37%	41%
- 2nd age travellers	40%	39%	41%	28%
- 3rd age travellers	21%	21%	21%	31%
<b>Social/income/education level</b>				
- upper	9%	11%	9%	3%
- middle	70%	69%	73%	57%
- lower	21%	19%	19%	40%
<hr/>				
<b>No. of trips</b>	18.2 mn	7.5 mn	10.7 mn	-
<b>Season of travel (3)</b>				
- summer season	-	65%	-	-
- winter season	-	35%	-	-
<b>Purpose of trip</b>				
- leisure	-	85%	-	-
- business	-	15%	-	-
<b>Length of stay</b>				
- short trips	-	28%	-	-
- long trips	-	72%	-	-
- mean length	-	9.4 nights	-	-
<b>Organisation</b>				
- pre-booked	-	63%	-	-
- individual	-	37%	-	-
<b>Transport (4)</b>				
- car	-	43%	-	-
- plane	-	36%	-	-
- coach	-	8%	-	-
- train	-	18%	-	-

### Source:

European Travel Monitor 1990, European Travel Data Center Luxembourg for  
TOURCONSULT/INTERNATIONAL EEC Project 409/90

Deviation from the Total or from 100% are due to rounding or multiple answers

- not available or not applicable

(1) can add up to more than "All Travel" since people can take both

(2) 1st age: 15-34 years; 2nd age: 35-54 years; 3rd age: 55+ years

(3) summer season = May-October; winter season (January-April and November-December)

(4) two answers possible

## 25. YUGOSLAVIA

	All Travel	Abroad (1) Travel	Domestic (1) Travel	Non- Traveller
<b>No. of travellers</b>	8.4 mn	3.4 mn	7.5 mn	-
<b>No. of non-travellers</b>	8.5 mn	13.5 mn	9.4 mn	8.5 mn
<b>Age (2)</b>				
- 1st age travellers	52%	56%	50%	35%
- 2nd age travellers	36%	35%	37%	34%
- 3rd age travellers	12%	9%	13%	31%
<b>Social/income/education level</b>				
- upper	21%	25%	21%	6%
- middle	51%	53%	51%	35%
- lower	28%	22%	28%	58%
<hr/>				
<b>No. of trips</b>	43.3 mn	7.9 mn	35.4 mn	-
<b>Season of travel (3)</b>				
- summer season	-	60%	-	-
- winter season	-	40%	-	-
<b>Purpose of trip</b>				
- leisure	-	79%	-	-
- business	-	21%	-	-
<b>Length of stay</b>				
- short trips	-	49%	-	-
- long trips	-	51%	-	-
- mean length	-	6.7 nights	-	-
<b>Organisation</b>				
- pre-booked	-	45%	-	-
- individual	-	55%	-	-
<b>Transport (4)</b>				
- car	-	52%	-	-
- plane	-	13%	-	-
- coach	-	27%	-	-
- train	-	7%	-	-

**Source:**

European Travel Monitor 1990, European Travel Data Center Luxembourg for  
TOURCONSULT/INTERNATIONAL EEC Project 409/90

Deviation from the Total or from 100% are due to rounding or multiple answers

- not available or not applicable

(1) can add up to more than "All Travel" since people can take both

(2) 1st age: 15-34 years; 2nd age: 35-54 years; 3rd age: 55+ years

(3) summer season = May-October; winter season (January-April and November-December)

(4) two answers possible

## **2. EUROPEAN TRAVEL - A TOURISM OVER-VIEW**

### **2.1 The 1980s**

#### **2.1.1 Introduction**

The impact of the oil crisis at the beginning of the decade followed by a general economic recession, Chernobyl, terrorism threats, the October 1989 Stock Market crash and pollution in the Mediterranean — all these reflect the vulnerability of travel and tourism to factors beyond the industry's control, both on the demand and the supply side.

Other factors also impacted negatively on certain sectors of the industry, including air traffic congestion and poor snow conditions in Europe's winter sports' resorts.

Nevertheless, travel and tourism registered rapid growth during the 1980s. As far as the leisure market was concerned, growth was spurred by shorter working hours and longer holiday entitlements in most countries. At the same time, holiday-taking became a much higher priority in many markets. The findings of market research studies in Germany and the UK, for example, indicated that the annual holiday was considered more important than buying a new car, a television or other material goods. Furthermore, people were no longer content to have just one annual holiday away from home.

As will be seen in the following chapters, second holidays and especially short breaks of one to three nights increased at a much faster rate than main holiday trips.

#### **2.1.2 EC Omnibus survey: Europeans and their Holidays**

The survey commissioned by the European Commission in 1985, "Europeans and their Holidays", used a sample base of 11,840 residents of the twelve EC member countries. The survey had a number of objectives: to

determine the numbers and characteristics of those among the adult population in Europe who go away on holiday and those who do not -to ascertain details of the holidays taken in 1985- and finally, to identify what people look for in a holiday.

The following table shows the travel intensity of the twelve nations according to the EC survey — the proportion of the adult population (aged 15 years and over) in each country who took a holiday that year of four days or longer — together with the percentage share of foreign trips to the total trips taken.

**Table 26**  
**European travel intensity, 1985**

Market	% share	
	Overall leisure travel intensity	Foreign trips as a share of total trips
Netherlands	65	64
Denmark	64	44
UK	61	35
Germany (West)	60	60
France	58	16
Luxembourg	58	94
Italy	57	13
Greece	46	7
Spain	44	8
Belgium	41	56
Ireland 39	51	
Portugal	31	8
<b>Total EC</b>	<b>56</b>	<b>32</b>

Source: EC Omnibus survey: Europeans and their Holidays, 1986

According to the results of the survey, some 56% of the adult population of the EC member countries travelled away from home on holiday in 1985. The share varied considerably from one Community country to another, ranging from 65% in the Netherlands to only 31% in Portugal.

The overall share of those who made more than one trip was 19%. While main holidays were very heavily concentrated during the months of July

and August — two out of three trips started in one of these two months — secondary holidays were much more evenly spaced throughout the year. Another characteristic of secondary holidays was that they tended to be much shorter in length.

The holidays of those Europeans who did go away conformed very much to a pattern, whatever their nationality, level of income, age or socio-occupational status, and irrespective of whether they worked or were retired.

Foreign trips accounted for an average 31% share of total leisure trips taken by adults in EC member countries but again, the share varied widely from market to market — from a high of 94% in Luxembourg to 7% in Greece. Travel to destinations outside Europe represented a low 3% of total trips.

For the majority of Europeans, secondary trips were more likely to be taken in their home countries, although this was not true in the case of the Danish and French who are more likely to take their main summer holidays at home and go abroad at another time in the year.

The main reason given by the 46% of Europeans who did not travel for leisure purposes in 1985 was that they could not afford it— 46% of overall responses and an even higher share in Portugal, Ireland and Greece. Yet 22% said they simply preferred to stay at home. Others mentioned reasons connected with work (16%), or special reasons such as change of house, health or family reasons (22%).

Socio-demographic factors also influenced numbers going away on holiday. These included age, the presence of children in the household, the type of location in which people lived, the head of the household's occupation and family income.

In general, younger people were more likely to go away on holiday, with travel intensity dropping over the age of 55. But there was little difference between travel intensity among the old and the young among the British and Germans. By contrast, the proportion of those travelling from the upper age group was much lower in Spain, Greece and Portugal.

Two-thirds of people living in large towns went away, compared with 45% of those living in villages.

Families in the top income group were twice as likely to go away as people in the lowest income group.

Sun & beach holidays accounted for some 52% of all trips, with the countryside being the second favourite type of holiday for Europeans (25% share), followed by the mountains (23%) and cities (19%).

Among the Dutch, Danes, Germans and Irish, sun & beach trips were less important, however. The Dutch, in particular, seemed to be more or less divided between the countryside, the sea and the mountains.

As far as transportation was concerned, the private car was the chosen mode for 68% of all trips, with rail and plane travel generating a modest 14% and 13% share respectively.

Hotels and boarding houses were the favourite accommodation (32%), although 21% stayed with relatives and friends, 17% in rented holiday homes and 16% opted for camping.

Although the EC Omnibus survey was only conducted once, which makes it difficult to determine any clear trends, the findings do confirm general travel patterns and characteristics identified in national travel surveys conducted in the individual markets and in non-EC European countries. These cannot strictly be compared, because of the different methodologies and sample bases used, but the following chapter (2.2) highlights some of the key growth trends in major markets.

## 2.2 National travel surveys

### Germany (West)

West Germany is Europe's leading outbound travel market, although overall leisure travel intensity is lower than in some other countries. Germans are also the world's biggest spenders on travel abroad.

According to the findings of the Studienkreis für Tourismus' annual Reiseanalyse, the share of Germans taking a holiday increased by close to ten percentage points from 1980 to 1990, although between 1981 and 1985, intensity actually declined, due to the second oil shock, economic recession at home and falling disposable incomes.

The total number of holidays rose from 32.8 mn in 1980 to an estimated 44 mn in 1990. In fact, the number of Germans taking two or more trips a year of four nights or longer has climbed more sharply than the overall leisure travel intensity.

More significantly, while the domestic holiday market has more or less stagnated, holidays abroad have risen strongly. Short breaks have performed even better.

Other European destinations receive the lion's share of West Germans' leisure trips - 89% of all holidays abroad in 1988, or 24.2 mn excluding Turkey. Destinations outside Europe account for a modest 3 mn (including Turkey) - 7.5% of overall trips and 11% of trips abroad.

Nevertheless, travel to non-European countries has registered the strongest growth in the past few years. Over the same period, the principal Mediterranean and non-sun European destinations have only managed increases of 27.2% and 23.1% respectively. Table 28 shows that after a decline from 1982 to 1984, holiday traffic to non-sun destinations picked up very strongly in 1987 and outperformed the Mediterranean in growth in 1988.

**Table 27**  
**West German holiday travel abroad, 1980-90**

	1980	1981	1982	1983	1984	
Population covered by survey (mn) <sup>a</sup>	47.0	47.5	47.9	48.1	48.3	
Population taking holiday (mn) <sup>b</sup>	27.1	26.6	26.3	26.2	26.7	
% taking holiday	57.7	56.0	55.0	54.5	55.3	
Total number of holidays (mn)	32.8	31.6	32.1	32.0	32.6	
Total number of holidays abroad (mn)	19.7	19.6	19.6	19.8	20.8	
% of holidays taken abroad	60.1	62.0	61.1	61.9	63.8	
Holidays taken outside Europe (mn) <sup>c</sup>	1.7	1.4	1.6	1.4	1.5	
% of holidays abroad taken outside Europe <sup>c</sup>	8.6	7.1	8.2	7.1	7.2	
	1985	1986	1987	1988	1989	1990
Population covered by survey (mn) <sup>a</sup>	48.3	48.3	48.2	48.7	...	...
Population taking holiday (mn) <sup>b</sup>	27.6	27.5	31.1	31.6	...	33.4
% taking holiday	57.1	57.0	64.6	64.9	66.8	...
Total number of holidays (mn)	32.3	32.4	37.7	40.2	43.3	...
Total number of holidays abroad (mn)	20.9	21.1	25.8	27.2	28.6	27.8
% of holidays taken abroad	64.7	65.1	68.3	67.6	...	...
Holidays taken outside Europe (mn) <sup>c</sup>	1.5	1.7	2.4	3.0	...	...
% of holidays abroad taken outside Europe <sup>c</sup>	7.2	8.1	9.3	11.0	...	...

**Source:** Studienkreis für Tourismus, Reiseanalyse, 1980-90

**Notes:** *a* population of West Germany aged 14 and over; *b* a holiday of five days or more away from home; *c* including Turkey



Table 28

## German travel to Mediterranean versus non-sun European destinations

	1984	1985	1986	1987	1988
	Total holiday trips, mn				
Major Mediterranean destinations*	11.4	11.8	12.3	14.4	14.5
Non-sun Europe	7.8	7.3	7.2	8.8	9.6
Of which:					
Austria/Switzerland	4.3	4.0	4.1	5.0	4.8
Netherlands	0.7	0.6	0.6	0.8	0.8
Denmark	0.8	0.7	0.6	0.6	1.0
Other Scandinavia	0.3	0.5	0.4	0.4	0.6
UK/Ireland	0.4	0.4	0.4	0.4	0.7

Source: Studienkreis für Tourismus

Notes: \* Spain, Italy, Greece, Yugoslavia, France

Since the mid-1980s, certain categories of holidays have grown more than others, notably sporting holidays - or holidays where sporting activities are viewed as an essential component - study/sightseeing trips and trips for rest and relaxation.

Favourite destinations for sporting activities are Austria (for walking, mountain hiking and skiing), the Benelux countries and northern France (cycling and riding), Greece and Yugoslavia (tennis and water sports) and Ireland (fishing and boating).

Study/sightseeing holidays (essentially cultural tourism) account for close to 2.5 mn of total main holidays abroad - five times as many as in Germany - and almost another 1 mn of additional trips. They also seem to be growing the fastest. The top destinations are the UK/Ireland and France, followed by Austria and Switzerland.

Germans have grown very health-conscious with almost 2 mn of them rating health as the main priority of their holidays. Two-thirds of all such trips are domestic and only two countries abroad, Switzerland and Austria,

generate any significant interest among Germans. This is mainly for "cures".

Summer holiday travel has grown less strongly than winter travel, especially in terms of nights abroad, with average trip duration declining by around 10% since the beginning of the 1980s.

### United Kingdom (UK)

The UK is second only to Germany as a generator of foreign trips. A mature market, characterised by a highly developed tour operator business, UK outbound travel grew rapidly in the 1980s despite a fall from 1983 to 1985.

Travel intensity, or the proportion of the total adult population taking a holiday has remained fairly constant at around 60% for more than 20 years, dipping slightly below this figure during periods of adverse economic conditions (e.g. 1978-1981), but rising to about 62% at times of more rapid growth. The proportion of the population taking more than one holiday rose rapidly in the 1960s and 1970s, but remained stable throughout the 1980s at around 20%.

Although there has been a revival in domestic travel since the end of the decade, the number of domestic holidays dropped by 30% from 1974 to 1988.

Around 88% of summer season (April to September) travel abroad from the UK is holiday travel, against around 76% in winter. But some 70% of all holidays are still taken in the summer.

Trends in nights abroad have followed closely trends in trips. An increasing number of short breaks (of 1-3 nights) have, however, brought a reduction in average trip duration.

**Table 29**  
**Growth in travel from the UK by purpose of travel and season**

	Mn visits, including day trips					
	1983	1984	1985	1986	1987	1988
<b>Summer season+</b>						
Holidays — pure	10.71	10.81	10.21	12.51	13.73	14.47
VFR*	1.64	1.66	1.59	1.66	1.87	1.95
All holidays	12.35	12.47	11.80	14.18	15.61	16.42
Business	1.13	1.57	1.62	1.65	1.78	1.73
Other	0.50	0.53	0.43	0.44	0.57	0.54
<b>Total</b>	<b>13.98</b>	<b>14.58</b>	<b>13.85</b>	<b>16.27</b>	<b>17.96</b>	<b>18.69</b>
Of which:						
day trips	1.30	1.05	0.80	1.03	0.78	...
<b>Winter season†</b>						
Holidays — pure	4.22	4.44	4.49	4.96	5.84	6.05
VFR	0.98	1.02	1.04	1.09	1.12	1.24
All holidays	5.20	5.46	5.53	6.05	6.95	7.29
Business	1.26	1.35	1.57	1.60	1.67	1.94
Other 0.48	0.48	0.43	0.54	0.59	0.43	
<b>Total</b>	<b>6.94</b>	<b>7.29</b>	<b>7.52</b>	<b>8.18</b>	<b>9.21</b>	<b>9.66</b>
Of which:						
day trips	0.83	0.78	0.69	0.89	1.25	0.61

**Source:** IPS (International Passenger Survey)

**Notes:** + April to September. † October to March and year ended March 31. \* Visits to friends and relations.

Both those taking holidays and non-holidaymakers are spread throughout all age groups, socio-economic groups and regions of the country. Nevertheless, the lower income groups are relatively less prone to take holidays and those they take are predominantly in the UK. In contrast, nearly all the professional and management groups take holidays, and the great majority take at least their main holidays abroad. Travel intensity falls among the elderly, notably those aged over 64. Regional differences in holiday taking are generally modest. However, there is some relative concentration, especially in foreign holidays, in the most prosperous parts of the country, especially the south east.

### France

The proportion of French adults taking an annual holiday trip of four or more nights was 59.1% in 1990, according to INSEE (Institut National de Statistique et d'Etudes Economiques). Although this was down over 1989, there has been a steady rise in leisure travel intensity since the mid-1970s when it hovered around the 52% level.

The high share of domestic holidays (82%) is due to the fact that France is not only the largest country in Western Europe, it also offers its 55.3 mn inhabitants an extremely varied landscape and climate and therefore, a wide choice of domestic holiday options. At the same time, the French - like the Italians and Spaniards - have traditionally spent their summer holidays either visiting their families or in the family second homes by the sea or in the country. There are close to 2.8 mn second homes in France.

The pattern has been changing slowly over the years, partly due to a reduction in the long summer school holidays and to the fact that fewer business concerns now close down completely for the month of August (some 40%, compared with 58% in the early 1980s), obliging their employees to take their main holidays at that time. But it is still quite common for wives and children to take off for the whole of the school summer holidays and for the husbands to join them for up to a month.

The highest leisure travel intensity is found among the upper income/job levels. But while it has changed very little among the higher earning

groups over the past 20 years or more, it has shown a sharp increase at some of the lower levels. A relatively high travel intensity of blue-collar workers is primarily accounted for by immigrants visiting families in their countries of origin.

**Table 30**  
**The French on holiday, 1986-90**

	1986	1987	1988	1989	1990
Travel intensity, %	58.2	58.5	59.5	60.7	59.1
No. of holiday makers, mn	31.7	31.9	32.4	33.3	32.7
No. of holidays, mn	59.7	61.9	62.7	64.0	63.1
Of which:					
in France	49.7	51.6	52.0	52.6	52.0
abroad	10.0	10.3	10.7	11.4	11.1
No. of days holiday, mn	911.9	926.7	934.4	928.0	912.5
Of which:					
in France	733.9	744.2	754.7	728.2	725.3
abroad	178.0	182.5	179.7	199.8	187.2
Average length of trip,					
nights	...	15.0	14.9	14.5	14.5

Notes: Years ended September 30.

Source: INSEE

Immigrants represent about 6.8% of the total population of France and 9% of the labour force. From 1968 to 1975, their numbers increased by a total of 31%, although this has since dropped by about 7%. The main ethnic components are: Portuguese (21%), Algerian (20%), Italian (11%), Moroccan (11%) and Spanish (10%).

Market segments which have shown the least growth over the last ten years — or even a decline in travel intensity — are the middle income levels.

In terms of age, the groups who travel most on holiday are the 1-13 and 40-49 year-olds, followed by the 14-19 year-olds and those aged between 25 and

39. Year by year fluctuations are not considered reliable indicators of trends, but the 25-39 year old age sector has registered a marked decline in travel intensity since the early-1980s. This is attributed to the declining standard of living during the period, which has particularly affected those single-income couples with children setting up homes.

Paris accounts for the largest number of holidaymakers per population, with 74% summer travel intensity and 46% winter intensity in 1990. During the last ten years, however, travel among the suburban population has almost caught up with that of the Parisians. But the strongest increase in travel intensity has come from the rural areas of France - up more than 100% over the period.

**Table 31**  
**Seasonality in French domestic travel, 1989-90\***

Month	% share of days holiday taken in France	
	1989*	1990*
October	1.4	1.6
November	1.3	1.5
December	4.1	4.5
January	2.3	2.0
February	4.3	4.2
March	4.0	2.1
April	4.6	6.1
May	3.6	2.9
June	4.2	4.2
July	26.6	26.4
August	38.4	38.6
September	5.4	5.8

Notes: \* Year ended September 30.

Source: INSEE

Summer holidays have been declining steadily in length since the late 1970s. Although much less mature than the other major European travel markets, trends developed in other parts of Europe towards shorter trips but

more frequent travel have slowly spread to France. In addition, the French are travelling more abroad and this has impacted on the length of their traditional summer vacations.

The share of French taking winter sports holidays has been slipping as more and more opt for winter sun trips. The average length of winter holidays has also declined as a result.

Nevertheless, there are still severe seasonality peaks, notably in July and August. Unlike the February half-term school break and the Easter school holidays, there is no staggering of summer school holidays in France.

Seasonality problems are exacerbated by the fact that in summer, over 50% of trips and nights spent on holiday are by the seaside. And this share is rising slowly. The countryside attracts 25% and French mountain resorts 14%.

French outbound travel displays many of the same characteristics as European outbound generally, although international travel intensity is considerably lower than in other major northern European markets.

In 1985, more than 85% of the population had never travelled by plane. The development of low cost air travel was very slow in France since the low demand did not justify the introduction of mass charter services as in Germany and the UK. *Nouvelles Frontières'* historic case before the European Court of Justice in April 1986 — which ruled that air transport came under the Treaty of Rome — has since stimulated travel abroad, especially by air.

According to INSEE, the French made 11.1 mn holiday trips abroad in 1990, a 2.6% decline over 1989. These generated some 187.2 mn nights abroad — or an average length of stay of 16.9 nights.

Trips abroad accounted for 18% of the total trips made by the French and 26% of overnights. More than one-third of trips abroad were VFR (visiting friends and relatives), which can be attributed largely to immigrant workers returning to their home countries. This also explains the relatively high

travel intensity among non-qualified blue-collar workers. Destinations primarily involved are North Africa and Spain.

Summer travel (May to September inclusive) accounted for 69% of the 11.1 mn trips and 80% of the nights generated abroad.

Over 72% of all summer leisure trips abroad were for European destinations in 1990 - down from 78% in 1987 - with Spain and its islands, Portugal and Italy heading the list of favourite holiday spots.

Serious comparisons on a year-by-year basis are difficult because INSEE frequently changes its destination groupings. But in the ten-year period to 1989, Spain/Portugal/Andorra have increased their market very slightly, maintaining their lead by a wide margin over the number two favourite destination, Italy, down in the ten years from a 16% to 9% share.

With the exception of the United States, long haul destinations are less visited during the summer months by the French than in winter, although the number of trips from France to Asia has more than doubled since 1987.

"Sun, sand and sea" destinations attract the largest share of French vacationers (37%). Touring comes a close second (21%), followed by holidays in the countryside and city trips.

Europe accounts for some 57% of all French winter trips (October to April inclusive). City trips abroad still attract the highest share of French holidaymakers (36%), but winter sun destinations — mainly long haul — have shown the strongest growth over the past five or six years and multi-destination round-trips account for a 25% share of the total winter trips abroad. Although the winter ski market is important overall, only 6% of winter trips are for ski holidays abroad. The favourite winter destinations in Europe for the French are Spain, Portugal and North Africa.

### ***Italy***

Despite their reputation as adventurous and enthusiastic travellers, Italians are among Europe's least travelled nations. But there are signs that the Italian outbound leisure travel market is now growing rapidly - probably at



the highest rate of any European market. It is estimated that outbound travel from Italy has increased by over 60% in the last five years or so.

Unfortunately, the outbound holiday market from Italy is poorly documented. No outbound data are collected at national level and research organisations which do undertake surveys employ such different methods of categorisation that they are often incomparable.

Two of the best sources of information are the Central Institute of Statistics (ISTAT), which carries out a survey on the vacation habits of the Italians every three years (the last one available is for 1985), and the Bologna-based ECONSTAT, which is a participant in the European Travel Monitor survey.

Leisure travel intensity was close to 50% in 1987 (up from 43% in 1983 and only 13.2% in 1959), and up to 55% in 1990, although it still varies widely in different parts of the country.

In the industrialised north, 58% travel at least once a year on holiday, which raised to 67% in 1990. Travel intensity among Romans was only 25% at the time, yet gave results of 58% for the whole central part of Italy in 1990. In the south of Italy, 17%, rising to 44% in 1990. Finally in 1990 the Islands of Italy showed a 31% travel intensity. Therefore there are indications that the vacation habit is filtering down from the cities to the towns and country people.

In terms of age breakdown, the most frequently travelled sector of the population are the under-30 year olds, followed by the 30-39 year olds. Travel intensity drops sharply among the 50-plus age bracket. The average age of Italian outbound leisure travellers is 35. The ECONSTAT study , IOTA 91, showed the following results:

Table 32 Italian Domestic and Foreign Travel

AGE	TOTAL	ABROAD
up to 24	66%	19%
25-34	64%	18%
35-44	56%	12%
45-54	53%	11%
55-64	39%	7%
+66	36%	5%

Source: IOTA 91, ECONSTAT

The strongest growth in outbound travel has been coming from the younger markets, particularly those from the middle income and education group and the DINKS (double income families with no children).

Of all foreign trips, 18% were shown by the ECONSTAT study IOTA, 1991, to be for long haul destinations - those showing the biggest growth in Italian visitors over the last couple of years.

An earlier survey conducted by ECONSTAT indicated that of all those who travelled abroad in 1986, 65% had gone abroad the previous year 18% of those travelling abroad took one such trip per annum; 16% two; 2% three; and 2% four or more - and the trend towards more and shorter holidays was growing.

The survey conducted later by ECONSTAT, (IOTA, 1991), indicates that of all those having gone abroad in 1990, 40% were high frequency, 28% medium frequency, and 18% high. Furthermore, 76% of those travelling abroad take one trip per annum; 16% two; 5% three; and 3% four or more.

In 1990 the number of holiday trips abroad generated by the Italian market (people aged more than 14) was 9.4 million, corresponding to 95 million nights. The volume of the market in terms of turnover (estimated by the consumption of Italians for holidays abroad) was of approximated 9.5 billion dollars.

Table 33

**THE ITALIAN MARKET FOR HOLIDAYS ABROAD IN 1990**

	all holidays	long holidays (4+ nights)	share of total holiday market (4+ nights)
millions of trips	94	7.6	18%
millions of bed-nights	95	91	18%

Source: ECONSTAT

The same figures for holiday trips abroad lasting at least 4 nights are: 7.6 million trips, 91 million nights and about 8.8 billion dollars.

The market for long (4+ nights) holidays abroad represents 18% of all long holiday trips taken by the Italians; the share is the same over total holiday nights. But in terms of expenditure the share of holidays abroad is estimated to be 32% of the total turnover for long holiday.

In 1985 Italy was the 13th "biggest spender" in international tourism; it ranked 8th in 1988 after West Germany, U.S., Japan, United Kingdom, France, Netherlands, etc.\*

Some 63% of all leisure travel takes place during July and August, although trips abroad are more evenly spaced out during the year. Long haul travel is more likely during the Italian winter months as the Italians, like their Spanish and French neighbours, traditionally spend their long summer holidays with friends or family by the Italian seaside.

Most leisure travel out of Italy is by private car, as for other European markets. Air travel is reported to be growing strongly, but details are not readily available.

### **Switzerland**

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\* Source: IOTA 1991 Italian Outgoing Tourism Analysis.

The population of Switzerland is around 6.5 mn - of which 65% German speaking, 18% French, 10% Italian, 1% Romansch (a strange mixture of German and Italian) and 6% other tongues. Some 15.6% of the country's inhabitants are foreigners, though the percentage is much higher in some parts of Switzerland, notably Geneva, which has more than one third non-Swiss residents.

Switzerland might be a small country, but the Swiss are among the most enthusiastic travellers in the world. In 1988, 76% of the total population (aged 0-79 years) took a holiday of four nights or longer, accounting for an estimated 9.7 mn trips and 105 mn nights away, according to the findings of the Swiss national holiday survey conducted by the Institute for Tourism and Transport at the University of St. Gallen. Last year, leisure travel intensity topped 83%, generating 11.3 mn trips and 117 mn nights away from home. That means 2.5 trips per trip-taker, compared with 2.1 two years earlier.

Some 62% of trips were for destinations abroad, with Europe attracting the lion's share. France has overtaken Italy to become favourite destination for the Swiss, with Spain, Austria and Germany in third to fifth positions. These destinations together still account for some 70% of all trips. No details on nights per destination are available.

**Table 34**  
**Swiss leisure travel, 1988-90**

	1988	1990	% change
Leisure travel intensity, % <sup>†</sup>	76	83	...
No. of trips, mn	9.7	11.3	16.5
Of which, % abroad	62	62	-
No. of trips per trip-taker	2.1	2.5	19.0
No. of nights, mn	105	117	11.4
Spending on leisure travel, SF bn	9.4	12.0	27.7
Of which, % share for trips abroad	...	78	...
Of total trips abroad, % share:			
- organised independently	60	55	...
- ITs <sup>#</sup>	20	21	...
- other booked through travel trade	20	24	...

**Source:** Institute of Tourism and Transport, University of St. Gallen.

**Notes:** <sup>†</sup> The percentage of the population (aged 0-79 years) who took a leisure trip of 4+ nights away from home, holidays and VFR included. Sample base for biannual survey 5,000 from 2,000 households in 26 cantons.

The traditional "sun, sand and sea" holidays predominate, but long haul travel has shown the strongest growth, with the number of trips to destinations outside Europe and the Mediterranean more than doubling since 1986.

Swiss spending on leisure travel last year exceeded SF12 bn — a rise of close to 28% over 1988. Some 78% of this was spent on travel abroad.

The private car is the most common form of transport used for Swiss outbound travel, but its share has been steadily decreasing year by year in favour of air travel, which now accounts for around one third of all trips abroad.

Around 50% of Swiss make their travel arrangements for foreign trips independently. This share has dropped from a peak of 75% in 1982. Of the

estimated 50% of trips organised through tour operators/travel agents - up from 40% in 1988 and one of the highest shares in all European markets - some 21% is for tour operators' packages. And organised tour programmes account for close to half of all spending on leisure trips abroad, according to the St. Gallen survey.

### Netherlands

There are two main sources of information on the Dutch outbound travel market: the Netherlands Institute of Public Opinion (NIPO) and the Netherlands Tourist Board (NTB). NIPO conducts an annual survey in September/October every year, using a sample base of 5,000, but the main market research is followed by two additional surveys during the following twelve months, in February and immediately after the main summer holiday season, using a smaller sub-sample base in each case. Results of the two surveys do tend to conflict, however.

The Dutch are amongst Europe's most enthusiastic travellers. An estimated 25 mn holidays were taken in 1988 (NTB), an increase of one-third over 1985. If short breaks of up to four nights are included in the count, leisure travel intensity is over 70%. Excluding short breaks, NIPO estimates it at 62.5% for 1988 - up from 60% the previous year.

The biggest growth over the last decade has come from holidays abroad. According to the NTB, 39% of the Dutch took a holiday in Holland in 1985, while 41% went abroad and 20% of the population took both a domestic and international holiday. The respective figures for 1988 were 33% trips in Holland (down six points), 48% abroad and 29% both.

According to NIPO, the Dutch outbound travel market is characterised by a fairly low level of brand loyalty. Less than 50% return to the same destination they visited the previous year as they enjoy travelling to different destinations. Of all those who have travelled abroad, an average of 4.5 other European countries have been visited at least once. Not surprisingly, because of the short distances involved, eight out of ten have already been to Belgium and West Germany, six out of ten to France, more than four out of ten to Spain and Italy and 3.5 to the UK.

**Table 35**  
**Share of Dutch holiday destinations abroad, 1982-88**

	1982	1983	1984	1985	1986	1988
—						
France	18	20	19	18	19	18
West Germany	17	16	15	16	13	14
Austria 16	13	14	13	13	14	
Spain	12	12	15	12	15	13
Belgium	5	7	5	5	5	7
UK/Ireland	5	4	5	4	4	4
Italy	6	6	5	4	4	5
Switzerland	6	5	5	4	4	4
Yugoslavia	3	2	3	4	4	4
Luxembourg	3	3	3	3	3	...
Portugal	1	1	2	2	2	...
Greece	2	3	4	4	4	4
Americas	3	2	3	3	2	...
Scandinavia	4	4	3	2	2	...
East Europe	2	2	1	1	1	...
Mid/Far East	1	2	2	1	1	...
Africa	1	1	1	1	1	...

**Source:** NIPO

**Note:** The effect of dual destination holidays and rounding errors results in the totals in each column not equalling 100.

It should be pointed out that the above percentages do not give a clear picture of the fluctuations in destination preference, nor of the growth in actual numbers of holidays. As an example, trips to the UK and Ireland reportedly climbed by close to 39% in 1988 - attributed to lower air fares and ferry crossings - although the destinations' market share did not change.

The private car dominates as a means of transport and the number of car trips (according to NIPO) was up 8% in 1988, although the share of plane travel has shown the strongest growth, both in market share - from 14% in 1987 to 19% - and in actual numbers.

**Table 36**  
**How the Dutch travelled on holiday, 1982-88**

Transport	1982	1983	1984	1985	1986	1988
—						
Car	68	69	67	67	65	60
Plane	12	12	12	13	14	19
Train	8	6	6	7	6	...
Bus/coach	8	7	8	8	9	...
Motorbike/bike	1	2	2	1	2	...
Cruise ship	1	1	1	1	1	...
Boat	2	2	1	1	1	...

Source: NIPO

The accommodation used by the Dutch on holiday has changed relatively little in terms of market share over the past decade, although the share of hotels on trips abroad rose from less than 30% in 1985 to 34% in 1988 (22% in 1988 for domestic and international trips combined). Camping and caravanning abroad dropped very slightly over the same period, to 25% from 27%. But the Dutch are still Europe's most enthusiastic campers.

There is no real seasonality problem in the Netherlands as in other European markets. Only 15%-16% of holiday departures take place in August. But charter sales are quite a bit lower during the winter months - Transavia, for example, operates only four out of its fleet of 13 aircraft in winter. School holidays have been staggered since 1986.

### Belgium

Belgium is one of Europe's least well documented travel markets. The main source of information on outbound leisure travel is the holiday survey conducted by the Bruges-based Westlaams Economisch Studiebureau (WES), but this survey is conducted every three years only.



A second survey has also been carried out in Belgium since 1985 - also on a three-year basis - by a research organisation called CIM. This is conducted on behalf of media clients and the same rules of secrecy apply although, since there are many more subscribers than for the WES survey, results are more easily obtainable. The sample base used for the 1989 survey (covering travel in 1988) is estimated at half the size of the WES sample, but it covers holidays of six nights or longer - compared with the European average of four nights plus.

Like Switzerland, Belgium is not a homogeneous market. The country has three official languages: French, Flemish (like Dutch) and German. The Flemings (5.6 mn population) live mainly in the north of the country, in Flanders; the French-speaking Walloons (3.21 mn) in southern Wallonia; and the 78,000 or so German speakers in a small part of the country east of Liège. Brussels, the capital, has a population of close to 1 mn and is officially bilingual.

According to CIM, 41.4% of Belgians - or 3.33 mn aged 14 years or older - travelled on holidays of six nights or longer in 1988. The share of travellers going abroad was a high 69.8% (2.33 mn). This compared with an overall leisure travel intensity of 39.7% in 1985 - 3.13 mn people, of whom 2.14 mn (or 27.2%) went abroad.

The growth in number of Belgians travelling abroad for their holidays, according to CIM, was a modest 8.6% over the three-year period, compared with an even lower 6.4% growth in holidaymakers overall.

**Table 37****Belgian leisure travel intensity and trips abroad, 1985-88**

	1985	1988
Overall net intensity, %	39.7	41.4
No. of holidaymakers, mn	3.1	3.3
Share of travellers abroad, %	68.5	69.8
No. of holidaymakers, mn	2.1	2.3

Source: CIM.

Results from the WES surveys are rather different, but it should be noted that they cover trips of four or more nights, rather than six plus as for CIM. In 1988, WES estimated that 6.9 mn holidays were taken abroad by Belgians, 81% of which during the summer months April-September.

Of the total holidays, 63%, or 4.4 mn, were for destinations outside Belgium - more than for the whole of 1985. According to the WES results, therefore, the increase in summer holidays abroad was a high 29.4% over the three-year period following 1985.

Travel intensity among the young - up to 24 years old - is reported to be much higher than for the rest of the population; the 55-plus age bracket hardly travels at all. Travel intensity in Brussels is the highest in the country at close to 70%, according to WES, and the Flemish tend to travel more on holiday than their French-speaking compatriots, reflecting in part the higher standards of living in Flanders.

Cost has always been the main reason attributed to the Belgians' lack of enthusiasm for travelling on holiday - the market's travel intensity is still among the lowest in Europe. For the whole of the 1970s and the first few years of the 1980s, Belgium suffered from high levels of unemployment, largely as a result of the recession in the coal and steel industries. Even by the mid-1980s, average salaries in Belgium were way below those in neighbouring European countries. Organised holidays, primarily package tours, were the most affected.

More than four out of five holiday trips are taken in the summer and 76% (65% of trips abroad) in July and August alone. But in terms of nights spent away from home, summer outweighs winter by only 3:1.

### Spain

Leisure travel intensity in Spain increased to 53% in 1990 — an 8 point rise over 1987 — according to the results of the official national travel survey conducted on behalf of the Secretariat General of Tourism by IPD Española. The survey used a sample base of 6,680 Spaniards aged 16 years and over and covered all trips of four nights and longer away from home.

Not only are more Spaniards travelling for leisure reasons, either. In the last three years, while the number of people taking one trip a year has actually declined slightly, some 38% more of the population are taking two trips, and the number taking three or more has risen by 175% .

In contrast with the more mature European markets, the Spanish have been increasingly opting for sun and beach holidays, mainly at the expense of city trips. But the majority are returning to destinations with which they are already familiar rather than travelling to unknown parts of the world.

Other interesting trends include a reduction in independently organised trips in favour of inclusive package tours and tailor made holidays booked through the travel trade, and the trend towards later and later booking. Some 24% more Spaniards booked their holidays within one month of departure last year — compared with 1987.

The foreign share of all leisure trips increased by 58% over the three year period, with 19% of Spaniards now taking at least one trip abroad. Hotel accommodation is gaining in popularity as the market ventures further away from home for its holidays, as is plane travel — at the expense of all other forms of transportation.

**Table 38**  
**Spanish outbound travel, 1987-1990**

	Market share, %		% point change
	1987	1990	
% Spanish taking a holiday <sup>†</sup>	45	53	8
Of which:			
One trip	33	32	-1
Two trips	8	11	3
Three or more trips	4	11	7
% foreign share of all trips	12	19	7
<i>Type of trip/destination:</i>			
Sun & beach	52	61	9
City break	29	18	-11
Mountain	9	16	7
Others 10	5	-5	
<i>Destination familiarity</i>			
Already visited	44	62	18
First time visit	55	38	-17
No answer	1	0	-1
<i>Type of accommodation:</i>			
Hotel	22	30	8
Other paid accommodation	41	44	3
Holiday home/family/friends	37	27	-10

**Source:** Spain's Secretariat General of Tourism, 1988 and 1991.

**Notes:** <sup>†</sup> Leisure trips of 4+ nights away from home taken by the adult population aged 16 years or over. ... = No answer. See text for further explanations.

Close to 25% of all Spanish outbound trips are within Europe. France accounts for the highest share, of 16.3% , followed by Portugal with 11.4% and Italy with 9.9%. Three non-European destinations feature in the top ten: the USA, in fifth position, with a 4.9% share; and Mexico and Morocco,

accounting for 2.3% of all trips each. Other significant long haul destinations include Egypt, Venezuela and China.

### **Denmark**

With a travel intensity of around 70%, according to the official Danish Holiday Analysis, Denmark is one of Europe's most mature travel markets — coming behind only Sweden, Norway and Switzerland. But the inclusive tour market — which accounts for well over 50% of Danish outbound leisure travel — is declining, with a drop of over 12% in 1989 and an even worse performance estimated for last year.

**Table 39**

**Danish leisure travel intensity, 1985-1987**

	1985	1986	1987
Population, '000	4,115	4,115	4,115
No. of leisure travellers, '000	2,470	2,634	2,808
Net travel intensity, %	60	64	68
No. of trips made	3,210	3,467	3,773
Gross travel intensity, %	78	84	91
Av. no. of trips per person*	1.30	1.31	1.33

**Source:** The Danish Holiday Analysis

**Notes:** \* Per person who took a holiday trip

Although reflecting the general trend among other northern European countries away from budget priced package holidays, there are also individual factors affecting the Danish market. A lagged effect of the recession of the latter half of the 1980s has occurred and there is less money available for leisure travel. Interest rates are also high and there seems to be a marked trend towards more domestic holidays.

**Table 40**  
**Foreign share of leisure travel from Denmark\***

	1985		1986		1987	
	mn	%	mn	%	mn	%
Domestic trips	0.8	20	0.9	21	0.9	23
Trips abroad	1.6	39	1.7	41	1.9	45
Total	2.4	59	2.6	62	2.8	68

Source: The Danish Holiday Analysis

Notes: \* Main holidays only

## 2.3 European travel in 1990 and since the Gulf war

### 2.3.1 Introduction

Since few official data have been published for 1990 and those that are available are not comparable, the following analysis and selected graphs of trends for 1990 and the first part of 1991 is based on the results of the European Travel Monitor, conducted by the European Travel Data Center. Full details on data collection and Methodology are provided in the Special section devoted to the ETM in the beginning of this report.

ETM was designed to rectify and collect data in a situation whereby comparisons between countries were difficult to make and where the production of comprehensive European tourism data was almost impossible.

For the first time a survey instrument was developed which covered not just the major countries, but all 18 countries of Western European from Iceland in the north to Portugal in the south-west and Greece in the south-east. Moreover it covers all international tourist trips involving an overnight stay or more, not just the longer holiday segment.

Furthermore, since one country's outgoing tourism is another country's incoming tourism, the European Travel Monitor data can be combined to

produce an overview of European tourism to an individual country.

For countries with relatively open land frontiers which in the past had found measurement difficult, this too has been a significant step forward.

The tables indicate, for each of the 24 countries in Europe and Europe overall - The 18 countries of Western Europe, plus six in Eastern Europe: Bulgaria, Czechoslovakia, Hungary, Poland, Romania and Yugoslavia - the total number of trips made in 1990, whether domestic or international.

These trips are broken down by age of traveller, or non-traveller, and by social, income and educational levels - as defined by the recommended standards of ESOMAR (European Society for Opinion and Marketing Research) in its Harmonisation of European Demographics.

In addition, all outbound trips are broken down into season of travel, purpose of trip, length of stay, organisation and transportation used.

Data on levels of trip taking - the proportion of the population that takes at least one trip away from home a year - are analysed separately in Chapter 3.

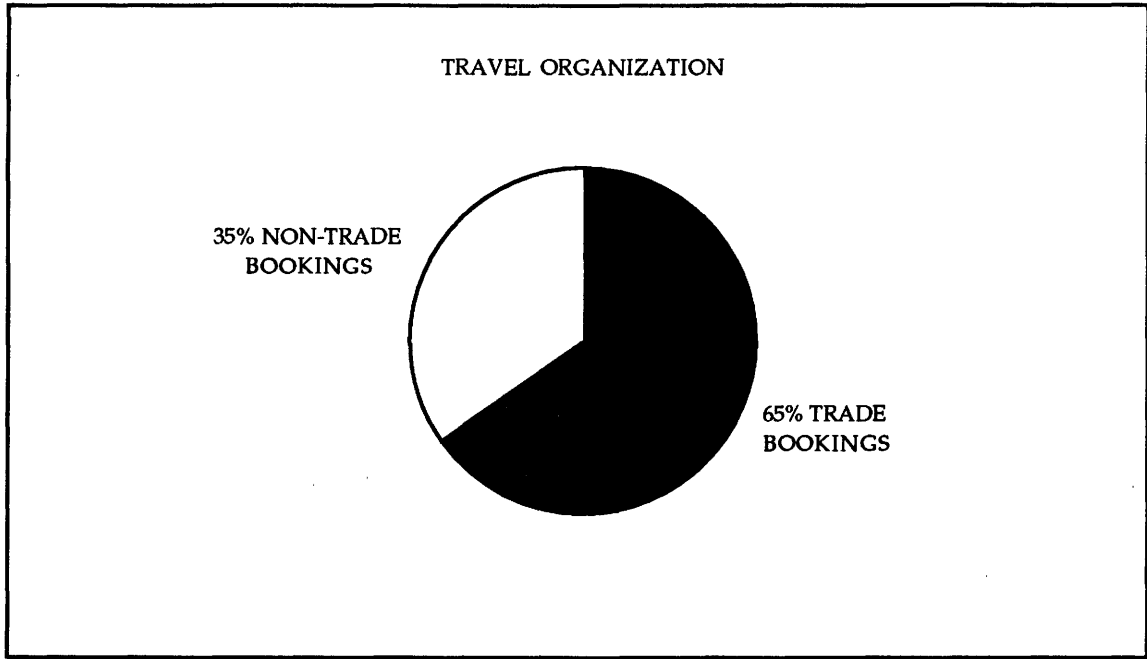
This Chapter concentrates on an analysis of travel volume and trips taken by the residents of the different EC and non-EC Markets.

In the charts which follow, some top-line data for 1990 is be given. Other charts will show trends, comparing 1990 with the previous year, 1989. All this is to illustrate by example the graphic material which forms an integral part of this study.

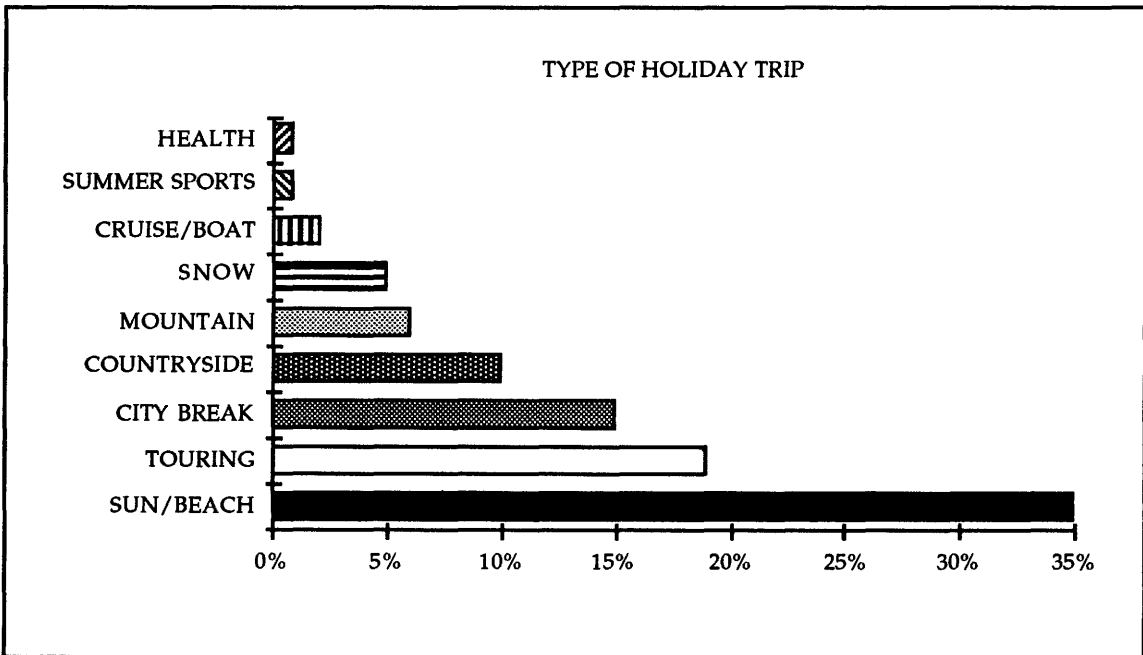
### **2.3.2 Selected Graphs of Travel and Accommodation Made in 1990 by Residents of the 18 Countries of Western Europe**

Here follows a selected number of graphs which relate to travel and trips outside countries of origin, which have a duration of at least one night, and which were made during 1990 by residents of the 18 countries of Western Europe.

Graph. 1

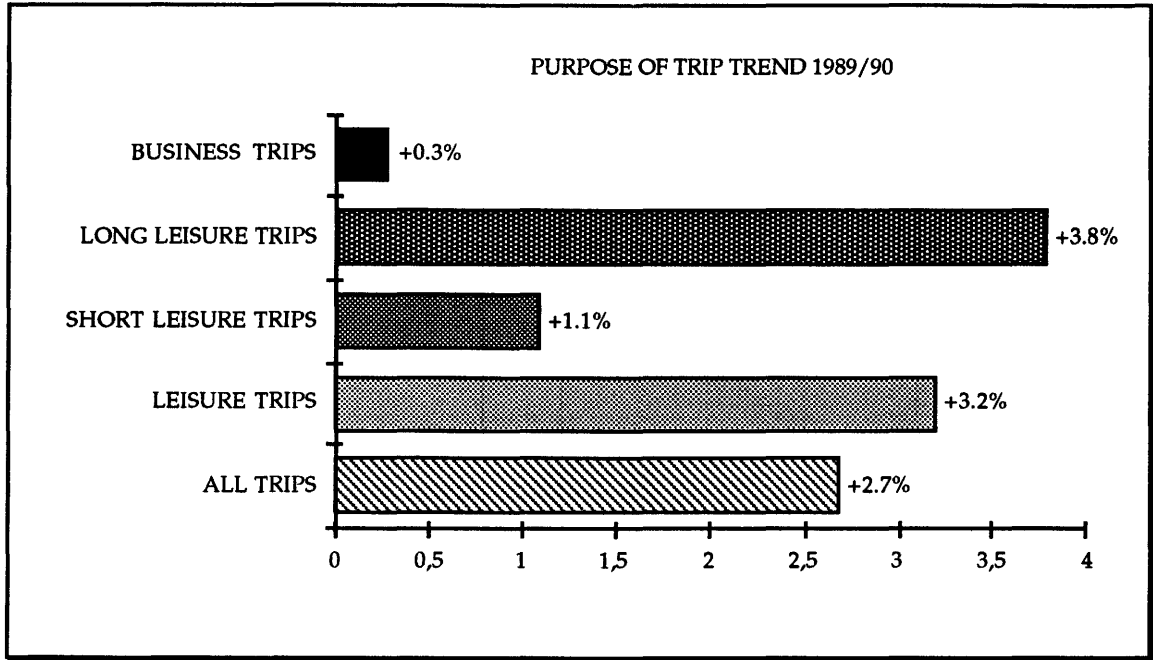


Graph. 2

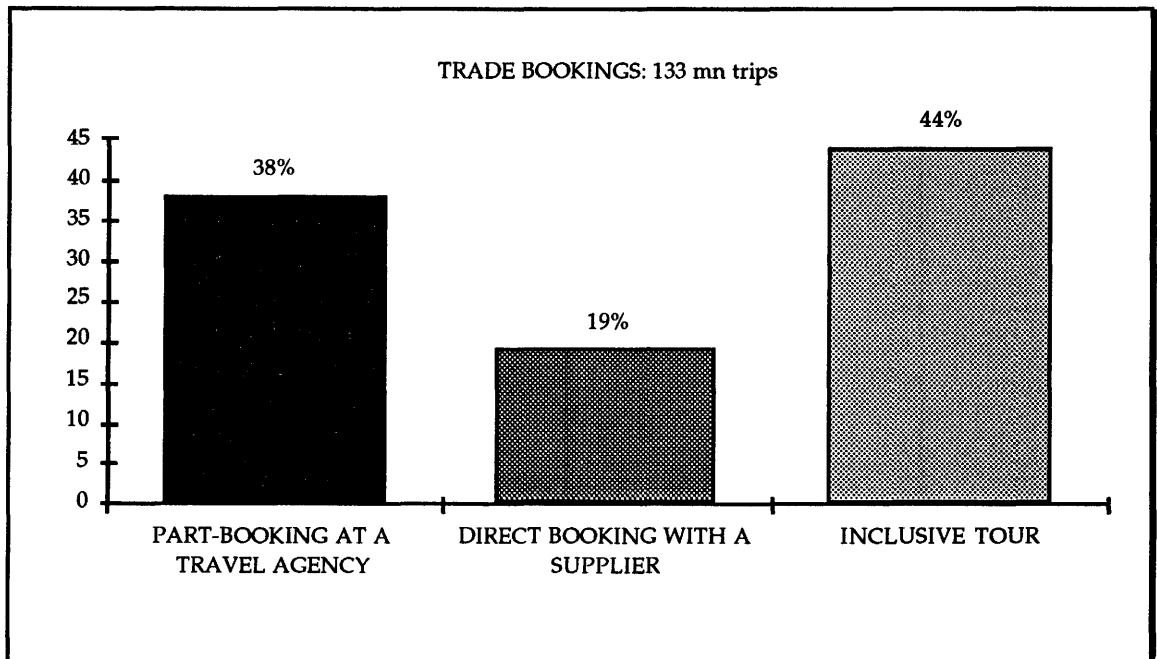




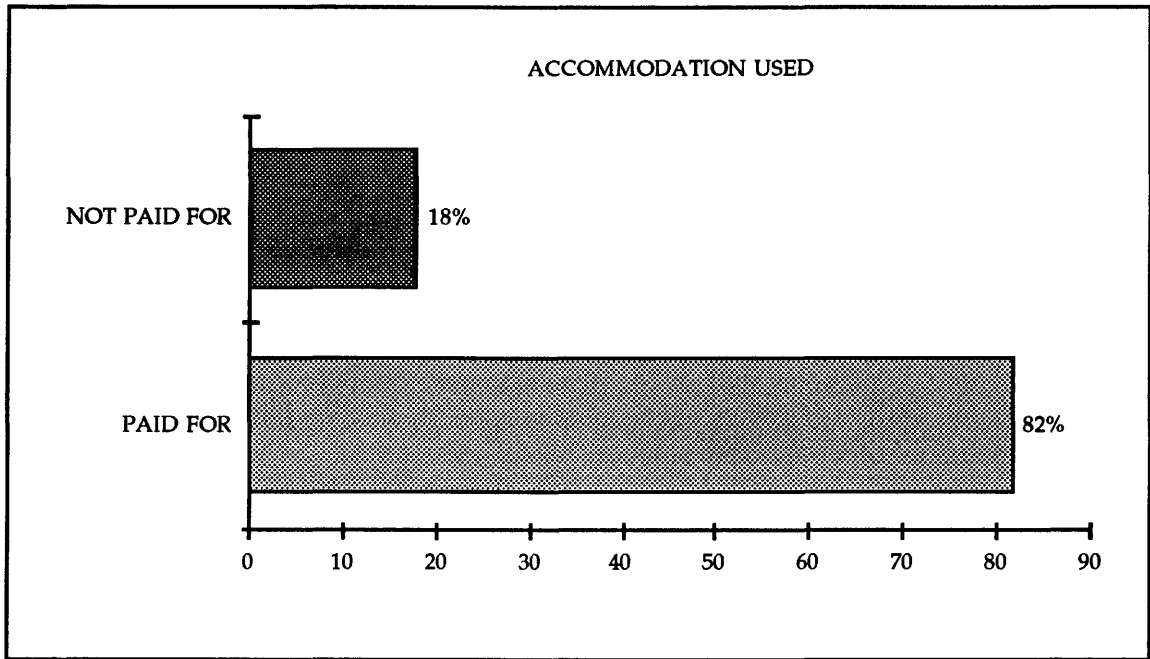
Graph. 3



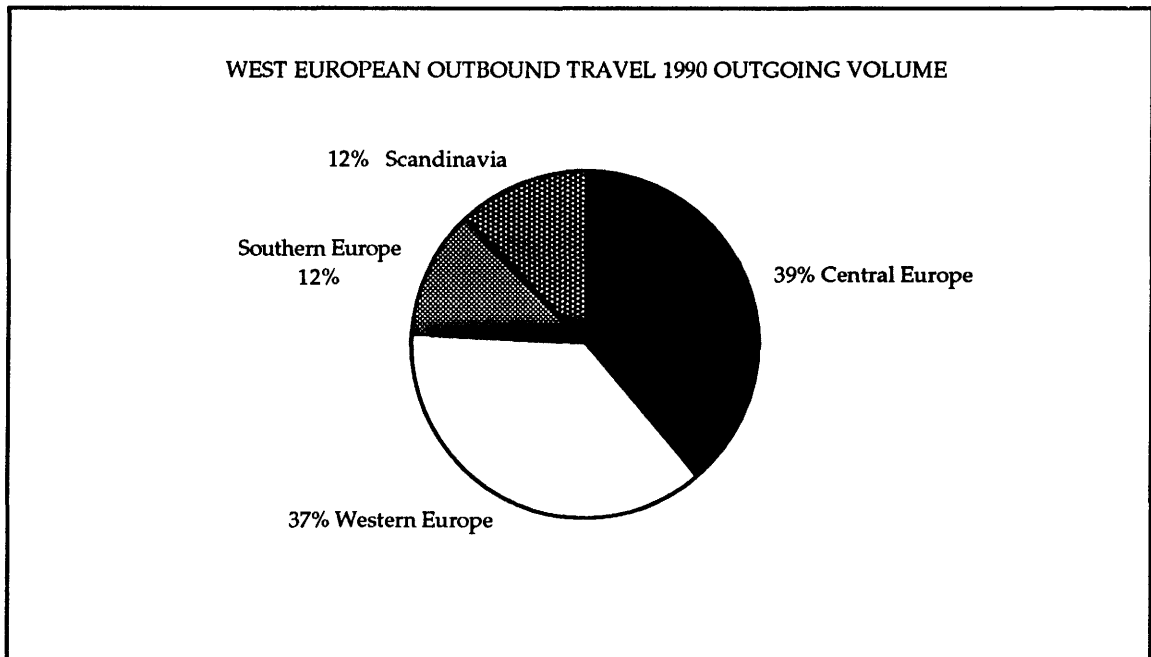
Graph. 4



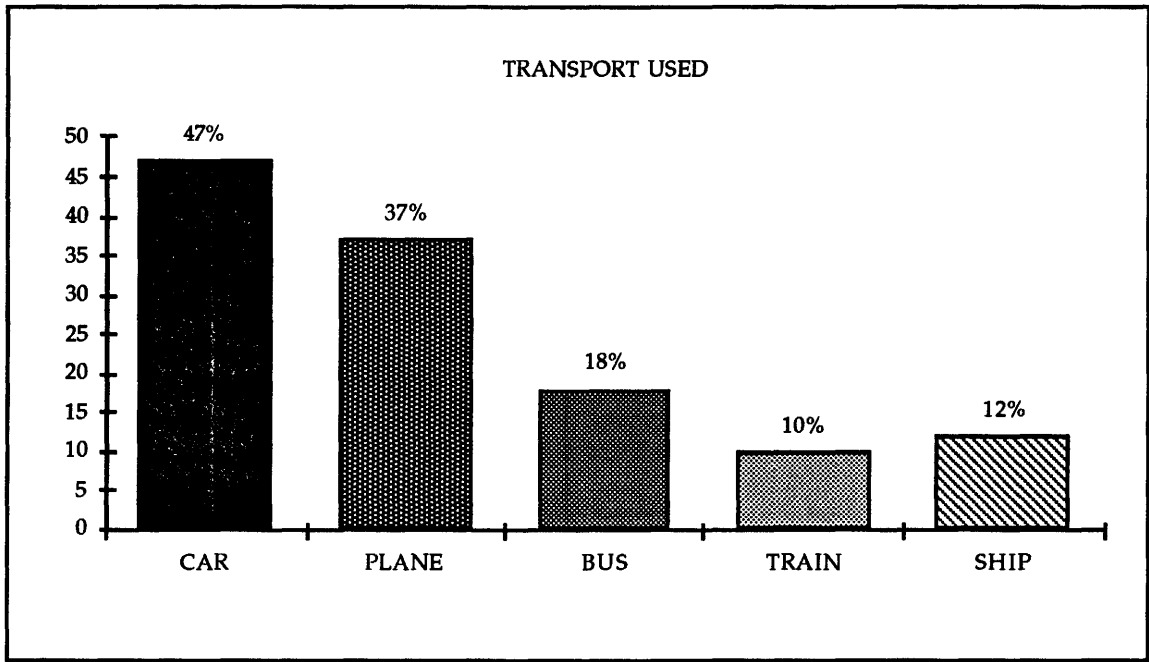
Graph. 5



Graph. 6



Graph. 7



### 2.3.3 1990 trends analysis

The data cannot be strictly compared with the EC Omnibus Survey for a number of reasons. Firstly ETM breakdown covers only trips abroad. Only totals are provided for domestic travel. Secondly, ETM covers 24 countries not just the EC members - all 18 West European and 6 East European.

In 1990, West European outbound travel registered a modest 3.4% growth to 206 mn trips of one night or longer. Of these, some 175 mn, or close to 85%, were for leisure purposes - including holidays, visits to friends and relatives (VFR) and trips for health, educational and other personal reasons.

Leisure trips overall rose by 3%, but the rise was due very largely to much stronger than average growth for short breaks of one to three nights. The volume of leisure trips of four nights and longer was up only 1% over 1989 — reflecting a general stagnation in the market for the second year running. More importantly, if trips of West Germans travelling to what was then East Germany are excluded from the count, the trend for the year was negative.

According to the European Travel Data Center — and this is confirmed by national travel market surveys available for some source countries — most major West German markets registered a drop in outbound travel last year. This includes the UK — which was the hardest hit — France, Italy and West Germany (excluding trips to East Germany).

Only long haul destinations achieved good increases, mainly because of the fact that the upper end of the market was much less affected by the general economic downturn and the rise in interest rates.

Short breaks, which have recorded double digit growth every year since the market was first monitored closely in the mid-1980s, account for around 20% of all West European outbound trips and are expected to increase market share in 1991.

Spending on travel abroad by West Europeans increased by 3.8% in 1990 to ECU 136 bn, according to the ETDC. This figure reflects the total spending

estimated by travellers on their foreign trips, including transportation, food, accommodation and all incidentals. It cannot, of course, be compared with travel expenditure figures published by OECD and European central banks.

**Table 41**  
**West European outbound travel, 1989-91**

	Number, mn	% change 1990/89	% change Jan-Apr 1991/90
All trips abroad	206	3.4	-5.9
Of which:			
Leisure† trips	175	3.0	-4.7
- Trips of 4+ nights	134	1.0	-5.8
- Short breaks	41	12.0	-1.6
Business trips	31	7.0	-11.7
Nights spent abroad	1,872	-3.1	-1.7
Spending* on travel abroad, ECU bn	136	3.8	-4.2

**Source:** European Travel Monitor; European Travel Data Center, Luxembourg for TOURCONSULT/ INTERNATIONAL EEC Project 409/90.

**Notes:** † Leisure covers holidays, VFR (visits to friends and relations) and trips for health, educational and other personal reasons. \* Spending includes all outgoings per trip.

**Table 42**  
**Total European Travel, 1990\***

	Number, mn	% Share
All trips	1,159.6	100.0
-Domestic	925.1	79.5
-Abroad	238.3	20.5
Of which:		
<u>Purpose</u>		
Leisure	202.6	85.0
Business	35.7	15.0
<u>Length of Stay</u>		
Short Trips#	69.1	29.0
Long Trips+	169.2	71.0
<u>Season of Travel**</u>		
Summer	152.5	64.0
Winter	85.8	36.0
<u>Organisation</u>		
Prebooked	150.1	63.0
Independent	88.2	37.0
<u>Transportation</u>		
Private Car	521.8	45.0
Plane	382.7	33.0
Coach	220.3	19.0
Train	127.6	11.0

**Source:** European Travel Monitor, 1990; European Travel Data Center.

**Notes:** \* Covers travel in 18 countries of Western Europe and six Eastern European countries: Bulgaria, Czechoslovakia, Hungary, Poland, Romania and Yugoslavia. # Trips of 1-3 nights in length. + Trips of 4+ nights. \*\*Summer = May-October; Winter = January-April and November-December. ++ Multiple answers possible.

The above table summarises the results of the European Travel Monitor (ETM) for 1990. Although the data cannot be compared strictly with the results of the EC Omnibus Survey conducted in 1985/86 - since the available breakdown relates to outbound travel only and since more than twice as many countries are included in the ETM - they do confirm certain trends already identified by the EC Survey.

For example, the data show that summer travel outweighs winter travel by about 2:1 in number of trips and that leisure travel is by far the most important motivation for travel. The bulk of travel is also for trips of four nights or longer, although - as can be seen by the comparative trends' analysis at the beginning of this chapter - short breaks are growing faster than longer trips.

The private car still dominates as the favourite means of transportation for European travel abroad, although it is losing ground in favour of air travel.

As far as organisation of trips is concerned, some two thirds of European trips involve some kind of prebooking of arrangements. This is contrary to popular opinion.

These averages clearly mask wide differences from market to market and these are looked at more closely in Chapter 4.

### **2.3.4 Leisure versus Business Travel**

Although it is difficult to make generalisations, it is noteworthy that business travel accounts for a higher share than average among both the Eastern European and the Nordic Nations - Denmark, Finland, Iceland, Norway and Sweden.

In the case of the former, this can be explained by the fact that the leisure travel is much less prominent as a result of the lower disposable incomes for leisure pursuits. As far as the Nordics are concerned, it is true to say that the level of business travel trip-taking from these countries is generally higher than in the other parts of Europe. In addition, Icelandics have so far

to travel abroad that they tend to take fewer holiday trips per year.

Other markets which show lower than average shares of leisure travel, such as Greece and Portugal, are among the least enthusiastic travellers abroad in Europe.

The highest share of leisure travel, in terms of number of trips, is found in Germany and Luxembourg - no doubt due to the high priority attributed by these markets to holiday travel and to the ease of cross border travel. It is also relevant to point out that a significant share of business travel from Belgium does not involve overnight stays, so is not included in the ETM.



**Table 43**  
**Purpose of Trip, Market by Market, 1990**

Market	% share of total trips	
	Leisure	Business
<b>Total Europe</b>	<b>85</b>	<b>15</b>
Austria	83	17
Belgium	87	13
Denmark	72	28
Finland	80	20
France	83	17
Germany (West + East)	92	8
Great Britain	86	14
Greece	66	34
Iceland	75	25
Ireland	88	12
Italy	88	12
Luxembourg	90	10
Netherlands	84	16
Norway	74	26
Portugal	79	21
Spain	81	19
Sweden	70	30
Switzerland	85	15
Bulgaria	72	28
Czechoslovakia	82	18
Hungary	77	23
Poland	81	19
Romania	79	21
Yugoslavia	79	21

**Source:** European Travel Monitor, 1990; European Travel Data Center.

### 2.3.5 Short versus Long Trips

One would expect the share of short trips of one to three nights stay abroad to be higher than average in countries of Western Europe which share common land borders with one or more other countries. But although this is the case with Austria, Belgium, Finland, Norway and Sweden, this is not always the general rule. The percentage of short trips abroad is well below average in Italy, Luxembourg, France and Germany.

As far as Germany is concerned, there are a couple of reasons for such high relative level of long trips of four nights and over. The first is that the short break market is still much less developed comparatively speaking. In addition, short trips away from home are more likely to be domestic trips and the German average has been influenced to some extent by the travel patterns of the former East Germans, included in the total count.

In Eastern Europe, economic motives are probably the major reason for the much higher than average share of short trips, not to mention the fact that the long holiday market is still very underdeveloped. In fact, the number of short trips is higher than that of long trips in Czechoslovakia and Romania.

Average length of trip is highest in Iceland - not surprisingly, given the travel distances involved. A similar argument holds true for Great Britain, Ireland and Greece. The average is also high for France and Italy, however, and this is more likely to be due to the fact that both markets are relatively immature - at least, in terms of level of trip-taking - and long haul trips account for more significant share than for European overall. Clearly, people travelling long haul tend to stay away longer to justify the cost of their trips.

**Table 44**  
**Average Length of Trip**

Market	% share of total trips		Mean Length of Trip, nights
	Short*	Long#	
<b>Total Europe</b>	<b>29</b>	<b>71</b>	<b>9.1</b>
Austria	35	65	7.7
Belgium	31	69	8.2
Denmark	25	75	7.2
Finland	43	57	6.2
France	22	78	11.1
Germany (West + East)	22	78	10.0
Great Britain	16	84	10.9
Greece	19	81	10.6
Iceland	11	89	14.4
Ireland	16	84	11.7
Italy	16	84	11.7
Luxembourg	18	82	10.7
Netherlands	27	73	10.0
Norway	47	53	6.0
Portugal	34	64	9.8
Spain	32	68	8.7
Sweden	42	58	6.8
Bulgaria	40	60	9.1
Czechoslovakia	61	39	4.9
Hungary	48	52	6.1
Poland	36	64	9.4
Romania	57	43	5.7
Yugoslavia	49	51	6.7

Source: European Travel Monitor, 1990; European Travel Data Center.

Notes: \*Trips of 1-3 nights. # Trips of 4+ nights.

### 2.3.6 Season of Travel

A comparison of trips across Europe according to season of travel provides some interesting results, although not all are easily explained. West European markets in which there is a markedly higher share of travel abroad during the summer months of May to October - compared with winter travel from November through April - are Iceland, Italy, Luxembourg and Germany.

In contrast, people living in Greece, Spain, Denmark and Sweden are much less likely than the average Europeans to travel abroad in summer. This is due to the fact that domestic travel is very important in these countries. It is especially understandable in Greece and Spain, since both these destinations are favourite foreign destinations for other Europeans.

The reason for the relatively high share of winter trips among the British is that the winter sun long haul market is very strong.

The high share of summer trips from Italy is much less difficult to understand, particularly as Italians are enthusiastic domestic travellers during the summer months and are also, at least relatively speaking, enthusiastic long haul travellers during the winter.

**Table 45**  
**Seasonality of Travel**

Market	% share of total trips	
	Summer +	Winter #
<b>Total Europe</b>	<b>64</b>	<b>36</b>
Austria	67	33
Belgium	60	40
Denmark	57	43
Finland	62	38
France	62	38
Germany (West + East)	70	30
Great Britain	57	43
Greece	53	47
Iceland	64	36
Ireland	76	24
Italy	76	24
Luxembourg	76	24
Netherlands	63	37
Norway	62	38
Portugal	64	36
Spain	54	46
Sweden	57	43
Switzerland	65	35
Bulgaria	58	42
Czechoslovakia	82	18
Hungary	80	20
Poland	70	30
Romania	70	30
Yugoslavia	60	40

Source: European Travel Monitor, 1990; European Travel Data Center.

Notes: +Summer = May to October. # Winter = January to April and November to December.

### **2.3.7 Organised travel in and from Europe and the Impact of Trends on Travel Facilities**

#### *Organisation of Travel*

The European Travel Monitor tables produced specifically for this study include a breakdown of the respective shares of organised and independent travel for each market. Organised travel refers to travel booked totally or in part through the travel trade or directly with airlines, hotels and other suppliers.

The data, which concern only international trips - a similar domestic travel breakdown is not available - are reproduced in the following table to facilitate comparison on a market by market basis.

**TABLE 46**  
**Organisation of European International Trips, 1990**

Market	% Share of Trips	
	Pre-Booked	Independent
<b>EC Europe</b>		
Belgium	58	42
Denmark	75	25
France	69	31
Germany (West & East)	56	44
Greece	76	24
Ireland	91	9
Italy	75	25
Luxembourg	56	44
Netherlands	49	51
Portugal	43	57
Spain	55	45
UK	91	9
<b>Other Western Europe</b>		
Austria	56	44
Finland	88	12
Iceland	86	14
Norway	81	19
Sweden	83	17
Switzerland	63	37
<b>Eastern Europe</b>		
Bulgaria	62	38
Czechoslovakia	64	36
Hungary	50	50
Poland	51	49
Romania	51	49
Yugoslavia	45	55
<b>Total Europe</b>	<b>63</b>	<b>37</b>

Source: European Travel Monitor, European Travel Data Center Luxembourg for TOURCONSULT/INTERNATIONAL EEC Project 409/90.

According to the European Travel Monitor, some 63% of all European outbound trips in 1990 - whether for leisure or business purposes - involved some kind of pre-booking. This means that they were either inclusive tour (IT) packages or trips using commercial transportation and/or accommodation, booked either through a travel agency/tour operator or directly with the relevant suppliers. Around 37% of all trips were independent - that is, for example, people travelled to their destinations in their own private cars and stayed with family and friends or in their own secondary/holiday homes and apartments.

As the above table clearly shows, there is no appreciable difference between organisation of travel in EC and non-EC Western Europe. Organised travel is much more important in the Nordic countries, but this is more related to the distances involved in travelling to their destinations abroad.

In the case of the UK and Ireland, the higher than average share of organised travel is due to the fact that since residents of these two countries need to cross water to travel abroad, some form of commercial transportation is necessary. It is also important to point out that the UK IT air holiday market is extremely developed.

Organised travel is by and large less important in West European markets whose residents travel mainly to neighbouring countries. These include Belgium, Luxembourg, Germany, the Netherlands, Austria, Portugal and Spain.

The data acquired from the European Travel Monitor do not differentiate between travel booked through trade - agents and operators - and that booked directly from suppliers. This does mask some of the differences from market to market and, especially, between Western and Eastern Europe. In Eastern Europe, for example, the IT package share is much lower.



**TABLE 47**  
**Type of Booking Patterns**

Market	% Share of Trips	
	Pre-Booked	Independent
<b>Total Europe</b>	<b>63</b>	<b>37</b>
Austria	56	44
Belgium	58	42
Denmark	75	25
Finland	88	12
France	69	31
Germany (West & East)	56	44
Great Britain	91	9
Greece	76	24
Iceland	86	14
Ireland	91	9
Italy	91	9
Luxembourg	56	44
Netherlands	49	51
Norway	81	19
Portugal	51	49
Spain	55	45
Sweden	83	17
Switzerland	63	37
<b>Eastern Europe</b>		
Bulgaria	62	38
Czechoslovakia	64	36
Hungary	50	50
Poland	51	49
Romania	43	57
Yugoslavia	45	55

**Source:** European Travel Monitor, European Travel Data Center Luxembourg for TOURCONSULT/INTERNATIONAL EEC Project 409/90.

**Notes:** Pre-booked includes inclusive package tours, trips partly booked through the trade, direct with airlines and other suppliers, or through clubs and associations.

The following table highlights the various means of transportation used by the Europeans travelling abroad. Most independent travel - involving no pre-booking through the trade or with suppliers - is private car based. So this provides a good indication of which markets are less developed in terms of organised travel.

If business travel is excluded from the count, the share of private car based trips is significantly higher than shown and for VFR travel alone (visits to friends and relatives), the share rises even more sharply. It goes without saying, too, that the private car accounts for a major share of domestic travel. In some markets, as can be seen in Chapter 2.2, this is as high as 70% or more.

Again, it can be seen that there is no marked difference in the type of transportation used by EC and non-EC country residents. Greeks are much more likely to travel by plane because of the large distances involved in reaching their preferred destinations, as are the Icelandics, British and Irish who have to travel across water to leave their respective countries.

Train travel as a main means of transportation is more important in central Western Europe - notably, from Switzerland, Austria, Germany and France - than it is in countries on the edge of Europe - Greece, Scandinavia and the UK/Ireland.

With the exception of Yugoslavia and Hungary, East European markets are much more likely to travel by train than their Western European counterparts. And, not surprisingly, plane travel is far less developed from this region.

Table 48

## Transportation used by Europeans on their International Trips, 1990

Market	% share of transportation modes:			
	Car	Plane	Coach	Train
<b>EC Europe</b>				
Belgium	52	23	14	9
Denmark	37	38	15	12
France	38	49	18	13
Germany (West & East)	55	27	25	11
Greece	18	54	23	5
Ireland	14	73	8	4
Italy	44	31	15	12
Luxembourg	62	12	19	7
Netherlands	59	24	13	9
Portugal	45	28	24	8
Spain	35	35	25	8
UK	25	67	14	5
<b>Other Western Europe</b>				
Austria	48	28	18	14
Finland	15	54	12	6
Iceland	7	96	6	6
Norway	31	44	9	5
Sweden	33	44	10	5
Switzerland	43	36	8	18
<b>Eastern Europe</b>				
Bulgaria	45	24	20	18
Czechoslovakia	41	4	42	14
Hungary	55	7	29	10
Poland	34	11	28	33
Romania	53	5	21	22
Yugoslavia	52	13	27	7
<b>Total Europe</b>	<b>45</b>	<b>33</b>	<b>19</b>	<b>11</b>

Source: European Travel Monitor, European Travel Data Center Luxembourg for  
TOURCONSULT/INTERNATIONAL EEC Project 409/90

**Table 49**  
**Transportation Used by Europeans Travelling Abroad**

Market	% share Trips*				
		Car	Plane	Coach	Train
<b>Total Europe</b>		45	33	19	11
Austria		48	28	18	14
Belgium		52	23	14	9
Denmark		37	38	15	12
Finland		15	54	12	6
France		38	49	18	13
Germany (West & East)		55	27	25	11
Great Britain		25	67	14	5
Greece		18	54	23	5
Iceland		7	96	6	6
Ireland		14	73	8	4
Italy		14	73	8	4
Luxembourg		62	12	19	7
Netherlands		59	24	13	9
Norway		31	44	9	5
Portugal		45	28	24	8
Spain		35	35	25	8
Sweden		33	44	10	5
Switzerland		43	36	8	18
<b>Eastern Europe</b>					
Bulgaria		45	24	20	18
Czechoslovakia		41	4	42	14
Hungary		55	7	29	10
Poland		34	11	28	33
Romania		53	5	21	22
Yugoslavia		52	13	27	7

**Source:** European Travel Monitor, European Travel Data Center Luxembourg for TOURCONSULT/INTERNATIONAL EEC Project 409/90

**Notes:** \* Percentages add up to more than 100 since multiple answers are possible.

### 2.3.8 Since the Gulf war

The Gulf war and the accompanying world economic recession have had a significant impact on outbound travel. But as shown by the results of the European Travel Data Center through its monitoring of the European market in the first four months of the year 1991, the impact was perhaps less dramatic in some sectors than both media and industry reports led the industry to believe.

Total outbound travel from Europe — measured in number of trips abroad — declined by 6% from January to April. The drop would have been 9% if travel by the former East Germans is taken out of the count. This represented some 2 mn trips, compared with 300,000 in the same period last year.

Business travel suffered the most, recording close to a 12% decline compared with a drop of less than 5% overall for leisure trips. And short breaks of 1-3 nights were, in fact, only down by a modest 1.6%, as opposed to a 5.8% fall in longer leisure trips.

In contrast with the trend over the past couple of years towards shorter trips, average length of stay abroad by Europeans during the four month period increased by 0.3 nights to 8 nights. This helped to stem the decline in overnight stays to less than 2% and in overall spending on travel abroad to 4.2%.

The strongest market growth came from Germany — thanks in large part to the East Germans — Finland, Sweden and the Netherlands. Belgium, Italy, Norway and Spain registered the sharpest declines in outbound trips.

There are few surprises as far as destination trends were concerned. Travel to the North Africa, Israel, Cyprus and Turkey was down by 50% or more; and by 20% to Greece. But there were also disappointing results for destinations closer to home. Yugoslavia recorded a drop of 12% in visitors from Western Europe and travel to Spain and Portugal also appears to have declined — though the small size of the sample for Portugal perhaps goes some way to explaining the sharp discrepancy between the ETM results and

official data from the Portuguese national tourist office.

Both Austria and Italy registered healthy growth during the four months — of 15 and 18% respectively for holiday travel, and 10 and 2% for total travel combined. A boom in travel by East Germans to both destinations contributed strongly to results, but the excellent snow conditions during the latter part of the winter season was also a major factor favouring Austria. Winter sports holidays among Europeans increased by an overall 24% over the period.

If the impact of the Gulf war was less severe than expected to certain destinations, the 13% fall in inclusive package holidays explains the travel trade's current concerns over the short and medium term prospects for the industry. Total bookings for holidays through travel agencies fell by 9% and air package holiday sales for the first four months declined by as much as 29%.

In contrast, an increase in last minute decisions to go on holiday boosted independent travel and the share of holidays booked in whole or in part directly with suppliers rose by 14%.

Despite a decline in trips using first class/deluxe and budget hotel accommodation, hotels still accounted for close to 60% of all accommodation — in terms of trips, not nights. Middle grade, or three star hotels increased business from Europeans, according to the ETM, though a large share of the increase can be attributed to the East German market — mainly booked as part of an inclusive package tour programme.

The biggest loss in market share was for rented holiday homes, down 11% for the European market overall.

## 2.4 Travel flows between Western and Eastern Europe

Travel and tourism between Western and Eastern Europe is the subject of two other studies currently being conducted for the Commission of the European Communities (Directorate General XXIII) within the framework of its Action Plan to assist Tourism.\*

In summary, West Europeans made 18.9 mn trips to Eastern Europe in 1990, generating 186.2 mn nights. East Europeans made 21.6 mn trips to Western Europe — accounting for 148.6 mn nights — and 12.5 mn trips to other parts of Eastern Europe (75.7 mn nights).

The main source markets in Western Europe for Eastern Europe are Germany (46% market share), Italy (13%), Austria (8%) and the UK (7%). In the opposite direction, Yugoslavia is the major market source (29% share of all East European trips to Western Europe), followed by Hungary (22%), Czechoslovakia (21%) and Poland (17%).

The main destinations in Eastern Europe for West Europeans — business and leisure travel combined — are: Yugoslavia (40%), Hungary (20%), Czechoslovakia (18%) and Poland (11%). The main West Europeans destinations for East Europeans are: Germany (33%), Austria (28%), Italy (14%) and Turkey (10%).

Pure holidays account for 75% of all West European trips to Eastern Europe and 45% of East European trips to Western Europe.

The private car dominates as the preferred transportation mode — 52% of West European trips to eastern Europe and 48% of trips in the opposite direction.

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\* For more detailed Statistical data on these tourism flows see the Study by IPK Munich for Project "Tourism Clientele in Central Europe and in Eastern Europe: Development Prospects (Ref 413) and for more information on non-CEC countries in terms of tourism flows - "Tourism Supply in Central Europe and in Eastern Europe. Problems and Prospects for Cooperation." (Ref 412)

## 2.5 Summary of Statistical Trends

While it is difficult to make generalisations about travel patterns and characteristics of the European travel and tourism markets, some clear trends have emerged through the 1980s and early 1990s.

- Summer travel, which accounts for close to two thirds of total trips per year, has been growing more slowly than winter travel in the 1980s, especially in terms of nights spent abroad. Nevertheless, the winter ski market suffered from 1986 to 1989 due to poor snow conditions in European mountain resorts.
- The number of nights spent on holiday trips, and especially on trips abroad have more or less stagnated, due to the increased tendency to take two or even more holidays during the year. In general, these are of shorter duration, too, which contributes to the lowering of average length of stay.
- Short breaks have shown stronger and faster growth than holidays of four nights or more.
- Long haul travel has gained at the expense of holidays to short and medium-haul destinations.
- Growth to non-sun short and medium-haul destinations has begun to outpace that to the traditional Mediterranean "sun, sand and sea" resorts.
- Car-based travel still dominates the outbound leisure travel market but is losing ground, mainly in favour of air travel. Not surprisingly the plane is still much less important for domestic travel.
- There has been a steady rise in the use of the travel trade for holiday bookings. But there has been a marked decline in northern European markets in low cost IT (inclusive tour) package sales. Nevertheless, the traditional summer IT sun & beach package still accounts for the biggest share of total leisure travel sales in these markets.



- Demand for activity holidays has been growing, with Europeans less and less willing to spend their holidays lying on a beach as they did ten years ago.
- Inbound travel to Europe from the rest of the world suffers much less from the seasonality that characterises much of European main holiday travel as will be seen in the study of worldwide tourism flows in Chapter 5.
- There is no appreciable difference in travel between EC and non-EC markets - as can be seen from the analysis carried out in the major source countries. The differences are much more marked between northern and southern Europe. In the 1960s and 1970s, the major growth in travel was from north to south. Since the late - 1980s, travel demand from southern Europe has developed much more strongly than in the past and this can be expected to continue in the 1990s.
- It is also expected to see much stronger percentage rate of growth to and from Eastern Europe between now and the year 2000.

Before a complete analysis of the European travel market can be drawn, it is important to determine which markets are close to reaching a ceiling as far as travel intensity is concerned — the proportion of the population who take at least one trip away from home. In some of the major European markets, growth in travel is unlikely to come from an increase in the number of trip-takers, but rather from an increase in the number of trips taken by these trip-takers. In other markets, in contrast, the share of non-travellers is still quite high, so there is much more room for growth.

The only source of current data on travel intensity and frequency is the European Travel Data Center's European Travel Monitor. Chapter 3 provides an analysis of the findings of this survey for 1990. The data are all extrapolated from the 25 tables provided by the ETDC.

### **3. LEVEL OF TRIP-TAKING ACROSS EUROPE**

#### **3.1 Introduction**

As can be seen from the findings in Chapter 2, most of the growth in travel within and from Europe in the 1980s came from people making more than one trip a year, rather than from new travel demand.

Unfortunately, there are virtually no data on first-time travellers. Some tour operators are able to identify their own client breakdown, but this does not allow for an assessment of overall market trends. The indications are that first-time travellers tend to travel independently, anyway, and so are not easily discernable.

One way of trying to determine the potential in individual markets for new travel demand is to identify the proportion of the population that already takes at least one trip a year. Some markets in Europe seem to be close to reaching a ceiling as far as level of trip-taking is concerned. And industry opinion is that future growth is much more likely to continue to come from an increase in the number of trips taken by existing trip-takers. In other markets, in contrast, the share of non-travellers is still quite high, so there is much more room for growth.

The only source of current data on travel intensity and frequency is the European Travel Data Center's European Travel Monitor. As has already been mentioned, these data were produced exclusively for the purpose of this study.

There are two different ways of measuring trends in trip-taking - both based on the European Travel Monitor data. The first, as shown in the ETDC tables, is to break down the total volume of trips - whether for domestic, outbound or total travel - into three different age groups and three separate social, education and income levels.

As can be seen from the tables, first age travellers (those aged from 15-34) account for the highest share of trips in all categories. The only source

countries where this is not the case are France and Sweden (all categories), Czechoslovakia and Greece (in so far as travel abroad is concerned) and Germany and Switzerland (for domestic travel).

In terms of social, education and income levels, the biggest share of trips is made by the middle levels. This does vary widely from country to country, however, and there are a number of exceptions to the general rule. As an example, there is little difference between the total volume of trips made by the middle and upper classes in Austria and Poland. In Denmark and Finland, Hungary and Romania, upper class travel is more important. In Greece, the upper levels generate the largest share of trips abroad. And perhaps surprisingly, there would seem to be much more travel among the lower than among the upper levels of society in Ireland, Italy, Portugal, Spain, Sweden, and Switzerland.

These data can be confusing, however. In many cases, the reasons for the discrepancy between the respective travel volumes in the different classes is due to the actual numbers of the population in the different classes. If the middle class population is disproportionately large, the volume of travel by the middle classes will also tend to be much larger than average. So these percentages do not indicate the level of trip-taking within each class of travel.

A preferred alternative method of approach, in order to obtain a clear indication of a market's propensity to travel, is to determine what proportion of each sector of the population takes a trip. This is known as the level of trip-taking, or travel participation. Data provided in this Chapter for this purpose have also been extrapolated from its main findings. This is the first time comparable statistics have been produced on Europeans' propensity to travel.

The European Travel Monitor defines the level of trip-taking as the percentage of the adult population in Europe (aged 15 years and over) who make a domestic or international trip of one night away from home for business, holidays, or other leisure purposes such as VFR (visits to friends and relations). Travel frequency indicates the average number of trips made by each of these trip-takers.

### 3.2 Overall travel intensity

As we have seen from Chapter 2, some 229 mn Europeans (aged 15 years and over) took a trip of at least one night away from home in 1990. This represented a 60% share of the 385 mn or so inhabitants of Western and Eastern Europe combined.

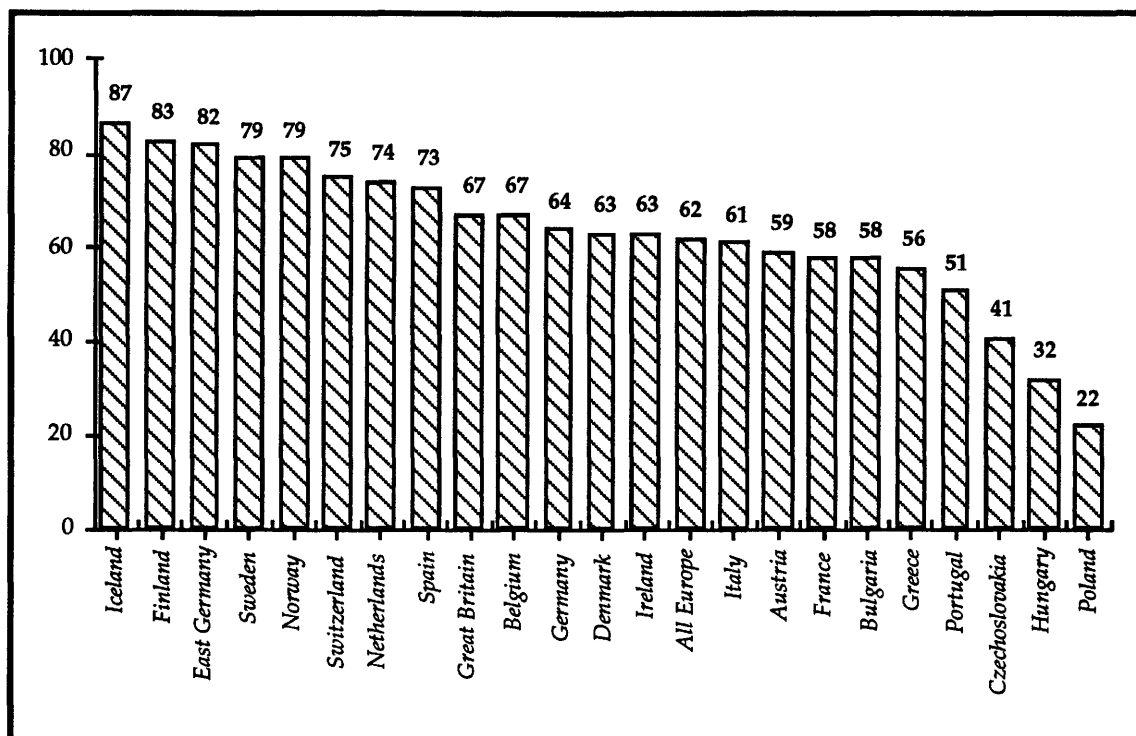
Around 177 mn, or 46%, took an average 5.1 domestic trips each, resulting in a total of 925 mn trips within national borders.


The proportion of Europeans taking an outbound trip was 26%. This means that just over 100 mn Europeans travelled abroad, generating a total of about 238 mn foreign trips, or 2.4 per trip-taker.

The share of Europeans who did not travel at all away from home was 40% in 1990. Although the figure cannot strictly be compared with similar figures published by other sources, it does confirm estimates widely quoted by industry observers and individual one-off surveys conducted in the pan-European market.

Graph. 8

### Level of trip-taking in Europe 1990 (Intensity)



 Travellers as % of total population (15+)

All travel (1 + nights): domestic + abroad/all travel = holiday + VFR + business + other

Source: European Travel Data Center, Luxembourg, and its European Travel Monitor for TOURCONSULT/INTERNATIONAL EEC Project 409/90

#### 3.2.1 Market by Market Comparisons

These averages mask a wide range of variations from market to market. As can be seen clearly in Table 42, the highest overall level of trip-taking in Europe is in Iceland (87%), followed by Finland, East Germany, Norway and Sweden.

Sweden also accounts for the highest frequency of trips per trip-taker among Europeans, with Swedish trip-takers making an average of 13 trips each in 1990. A large share of these trips, of course, were for destinations within Scandinavia.

Not surprisingly, all the East Europeans markets have a much lower level

of travel participation than the European average. Bottom of the list is Poland, with only 22% of Poles taking a trip of at least one night away from home in 1990.

Nevertheless, the 58% of Bulgarians who travelled last year took an average of more than 11 trips each. The vast majority of these were domestic.

Four West European markets — Portugal, Greece, France and Austria — also have a lower level of trip-taking than average.

After Sweden and Bulgaria, the markets with the highest level of trips per trip-taker are Finland, Norway and Denmark. This reflects the enthusiasm for travel among the Nordic nations.

Overall frequency of trips per trip-taker is lowest in Luxembourg, East Germany, Ireland and Italy. Almost all the East European markets generate more trips per trip-taker than average, but this is easily explained.

**Table 50**  
**Who travels the most... and the least?**

Rank	Market	Overall level of trip-taking† 1990, %	No. of trips per trip-taker
1	Iceland	87	5.7
2	Finland	83	9.5
3	Germany (East)	82	3.4
4	Norway	79	8.5
5	Sweden	79	13.0
6	Spain	76	6.4
7	Switzerland	75	4.9
8	Netherlands	74	6.2
9	Belgium	67	5.2
10	U.K.	67	4.0
11	Luxembourg	65	3.0
12	Germany (West)	64	4.8
13	Denmark	63	7.9
14	Ireland	63	3.4
15	Italy	61	3.6
<b>Total Europe</b>		<b>60</b>	<b>5.1</b>
16	Austria	59	5.0
17	Bulgaria	58	11.1
18	France	58	4.0
19	Greece	56	5.1
20	Portugal	51	5.3
21	Yugoslavia	49	5.3
22	Czechoslovakia	42	6.0
23	Romania	36	6.3
24	Hungary	32	6.6
25	Poland	22	4.9

**Source:** European Travel Monitor; European Travel Data Center Luxembourg for TOURCONSULT/INTERNATIONAL EEC Project 409/90.

**Notes:** † Percentage of the adult population (aged 15 years and over) taking a trip of at least one night away from home.

Travel is still very much the prerogative of the upper income, educational and social classes in these countries. And those who do have money to spend on travel tend to travel more frequently, rather than limiting themselves to just one trip per year. In addition, business travel — which is becoming increasingly important in these markets — is usually much more frequent than leisure travel.

### 3.2.2 Domestic Versus Foreign Travel

Table 43 compares the level of trip-taking across Europe for domestic and foreign travel. Clearly, there is a significant share of travellers in most countries who take both domestic trips and trips abroad.

Domestic trip-taking is highest in Iceland (81%), Spain (73%), East Germany (71%), Norway (70%) and Finland (67%); and lowest in Luxembourg (11%) — not surprisingly, considering the size of the Duchy — Poland (20%), Hungary (24%) and Belgium (25%).

For the majority of markets, the level of trip-taking for foreign destinations is considerably lower than that for domestic travel. Iceland is a case in point, as is Spain. The Swiss, however, are just as likely to take a foreign trip as they are a domestic one. And the level of travel abroad is actually higher than domestic travel in some markets, notably Belgium, Luxembourg, the Netherlands and West Germany.

For people living in the relatively small Benelux countries, it is obviously just as easy to take their private cars and travel across the border as it is to travel to a destination within their own countries. In the case of Germany, it is more a question of the market's maturity. Domestic travel tends to decline in favour of foreign travel as the market becomes more travel experienced.



**Table 51**  
**Domestic versus foreign travel**

Market	Level of trip-taking† 1990, %		
	All trips	Domestic trips	Foreign trips
Iceland	87	81	37
Finland	83	67	51
Germany (East)	82	71	32
Sweden	79	56	47
Norway	79	70	44
Spain	76	73	14
Switzerland	75	54	54
Netherlands	74	39	53
U.K.	67	53	28
Belgium	67	25	54
Luxembourg	65	11	62
Germany (West)	64	31	38
Denmark	63	35	43
Ireland	63	49	31
Italy	61	55	16
<b>Total Europe</b>	<b>60</b>	<b>46</b>	<b>26</b>
Austria	59	40	41
France	58	48	20
Bulgaria	58	57	10
Greece	56	52	14
Portugal	51	49	13
Yugoslavia	49	45	20
Czechoslovakia	42	36	24
Romania	36	33	15
Hungary	32	24	18
Poland	22	20	8

**Source:** European Travel Monitor; European Travel Data Center, Luxembourg for TOURCONSULT/INTERNATIONAL EEC Project 409/90.

**Notes:** † Percentage of the adult population (aged 15 years and over) taking a trip of at least one night away from home.

European markets with the highest propensity to travel abroad (Table 44) are generally those from which cross border land travel is easy, such as the Benelux countries, Switzerland, Denmark and Austria. Clearly, it is much more difficult and expensive for the British or Irish to go abroad, since they either have to travel by plane or by ferry. This also has a significant impact on the volume of short break outbound travel from these countries.

All the Scandinavian markets have a much higher than average level of trip-taking abroad, attributable largely to the important share of intra-Scandinavian travel.

Not surprisingly, East European markets rank among those with the lowest levels. Despite their new found freedom to travel, East Europeans often do not have the financial resources to make a trip abroad. But foreign travel does not feature prominently in a number of West European countries, either, notably Greece, Portugal, Spain, Italy and France.

**Table 52**  
**Who travels the most abroad?**

Rank	Market	Level of trip-taking abroad† 1990, %	No. of trips per trip-taker
1	Luxembourg	62	2.4
2	Belgium	54	3.8
3	Switzerland	54	2.8
4	Netherlands	53	2.7
5	Finland	51	2.1
6	Sweden	47	3.3
7	Norway	44	2.8
8	Denmark	43	3.3
9	Austria	41	2.5
10	Germany (West)	38	3.9
11	Iceland	37	1.6
12	Germany (East)	32	1.6
13	Ireland	31	1.5
14	U.K.	28	2.1
	<b>Total Europe</b>	<b>26</b>	<b>2.4</b>
15	Czechoslovakia	24	2.3
16	France	20	1.7
16	Yugoslavia	20	2.7
18	Hungary	18	4.5
19	Italy	16	1.8
20	Romania	15	2.2
21	Greece	14	2.1
22	Spain	14	2.2
23	Portugal	13	2.3
24	Bulgaria	10	2.3
25	Poland	8	3.3

**Source:** European Travel Monitor; European Travel Data Center, Luxembourg for TOURCONSULT/INTERNATIONAL EEC Project 409/90.

**Notes:** † Percentage of the adult population (aged 15 years and over) taking a trip of at least one night away from home.

### 3.2.3 Foreign Trips as a Share of Overall Trip Volume

There are alternative ways of measuring the importance of travel abroad in specific markets. One of the standard tabulations from national travel surveys is the share of foreign trips as a percentage of total trip volume, as shown in Table 45.

It should be stressed again that these figures cannot strictly be compared with those from other sources because of the different methodologies involved. But since they are comparable from market to market, they do provide an extremely interesting overview of the patterns across Europe.

Only two markets generate a higher share of foreign than domestic trips: Luxembourg and Belgium. Both countries, particularly Luxembourg, are small in surface area, so it is understandable that their inhabitants should travel frequently abroad.

It is interesting to note the big difference in share of foreign travel between Belgium (60%) and the Netherlands (32%). The Dutch are much more likely to take a domestic trip than the Belgians are and those who do travel within their own country make far more trips than the Belgians do.

The foreign share of trips is especially low in Bulgaria, Spain, Greece, Iceland and Portugal.

**Table 53**  
**Foreign trips as a % share of total trips**

<b>Market</b>	<b>Foreign trips as a % of total trips, 1990</b>
Luxembourg	67
Belgium	60
Germany (West)	48
Switzerland	41
Hungary	36
Austria	34
Netherlands	32
Denmark	28
Ireland	22
Poland	22
U.K.	22
<b>Total Europe</b>	<b>21</b>
Czechoslovakia	20
Germany (East)	19
Norway	18
Yugoslavia	18
France	15
Romania	15
Sweden	15
Finland	14
Italy	13
Iceland	11
Greece	10
Portugal	10
Spain	6
Bulgaria	3

Source: European Travel Monitor; European Travel Data Center, Luxembourg for  
 TOURCONSULT/INTERNATIONAL EEC Project 409/90.

### 3.3 Participation in Holiday Travel Abroad

A breakdown of the level of trip-taking abroad by type of travel highlights the different market characteristics even more clearly. Only 16% of the French and 13% of Italians take a holiday abroad, for example, compared with 36% of West Germans, 50% of Belgians and 52% of Swiss.

While economic factors do contribute to the low share of foreign trips, the main reason is the traditional holiday travel patterns of the Latin, or southern European markets. Firstly, all these countries are popular holiday destinations in themselves and offer their inhabitants a wide choice of domestic holiday options, notably for sun and beach enthusiasts.

At the same time, the predominantly Latin nations have traditionally spent their summer holidays either visiting their families or in the family second homes by the sea or in the country. The pattern has been changing slowly over the years, but it is still quite common for wives and children to take off for the whole of the school summer holidays and for the husbands to join them for up to a month.

In addition, because of the relatively low demand for foreign travel in the 1960s and 1970s, it was uneconomic to start up charter plane services, as was the case in the northern European markets. These low cost charter services, in turn, stimulated increased demand for mass travel abroad, which largely explains why the northern markets are much more developed than their southern European counterparts.

**Table 54**  
**Level of trip-taking abroad by type of trip**

Market	Level of trip-taking abroad† 1990, %			
	All leisure	Holidays	Other leisure#	Business trips
Austria	39	37	4	4
Belgium	52	50	4	5
Bulgaria	8	3	5	3
Czechoslovakia	21	14	9	5
Denmark	39	35	5	8
Finland	49	47	4	6
France	18	16	2	3
Germany (West)	38	36	1	2
Germany (East)	31	27	6	3
Greece	11	10	2	3
Hungary	15	10	6	4
Iceland	32	27	6	8
Ireland	29	25	5	3
Italy	14	13	1	3
Luxembourg	60	57	3	3
Netherlands	51	49	3	8
Norway	41	39	3	9
Poland	7	4	3	1
Portugal	11	8	3	2
Spain	13	11	3	3
Sweden	43	39	7	10
Switzerland	52	52	*	5
U.K.	27	27	1	3
Yugoslavia	16	9	8	4

**Source:** European Travel Monitor; European Travel Data Center, Luxembourg for TOURCONSULT/INTERNATIONAL EEC Project 409/90.

**Notes:** † Percentage of the adult population (aged 15 years and over) taking a trip of one night minimum away from home. # Other leisure includes VFR (visits to friends and family) and trips for reasons such as health, education and religion. \* Less than 0.5%.

### 3.4 Frequency of Trip-Taking

If the level of trip-taking indicates a market's propensity to travel, the frequency — that is, the average number of trips taken per trip-taker — determines the overall volume of trips and helps to provide a better understanding of individual market characteristics.

For all foreign travel combined, the highest frequency of travel is found in Hungary, followed by West Germany, Belgium, Sweden and Denmark. Hungary is the only one of these markets in which the level of trip-taking is lower than the European average. But Hungarians who do travel abroad — those with the financial means to do so — often make several trips a year.

An analysis of the holiday sector alone illustrates the trend more clearly. Hungary generates 3.8 foreign holiday trips per trip-taker, compared with 3.1 for Belgium and 3.0 for West Germany — the two West European markets in which holiday travel frequency is the highest. Sweden and Denmark generate only 2.3 trips, and the average is below 2.0 for most other markets.

This helps to explain the importance of the West German travel market, too. Although only one-third of all West Germans took a holiday abroad in 1990, this relatively modest share of Europe's most heavily populated country averaged three trips each during the year. In contrast, France and Italy's importance in world travel volume are due to the overall size of their respective populations, not to the enthusiasm of their inhabitants for foreign travel.

In the business travel sector, there are some very marked differences from market to market. West German outbound business travellers average as many as 8.6 trips abroad each, despite the low level of business trip-taking. In contrast, the 8% of Icelandics who travel abroad on business make an average of only 2.1 trips each.

Germans are also very strong in the VFR sector (visit to friends and relatives) since, while only 1% of the population takes a VFR trip abroad, an average of 17.1 were made by these people last year. And this excluded West German trips to the former East Germany.



## **3.5 Influence of Socio-Demographic Factors**

### **3.5.1 Age**

Table 47 highlights the facts that in general, the level of trip-taking — whether for domestic or foreign trips — is highest among the younger segments of the population and drops sharply after the age of 55. The trend is very marked in Germany, Spain, Belgium, Greece, Hungary, Italy, Poland and Yugoslavia.

There are exceptions, of course, particularly in the case of travel abroad. The share of people in their late-20s and early-30s from single income families with young children is often quite significant and this segment of the population is far more affected by economic pressures on living standards.

**Table 55**  
**Level of trip-taking across Europe by age**

Market	% share of population travelling in each age bracket, 1990					
	<u>All travel</u>			<u>Foreign travel</u>		
	15-34 years	35-54 years	55 plus years	15-34 years	35-54 years	55 plus years
Austria	67	65	44	45	45	30
Belgium	76	67	53	63	54	40
Bulgaria	70	66	34	13	12	4
Czechoslovakia	47	44	31	26	28	14
Denmark	68	69	50	47	48	32
Finland	86	89	70	54	60	36
France	67	64	45	24	21	15
Germany (West)	67	71	53	47	44	24
Germany (East)	88	88	69	40	34	20
Greece	63	57	38	13	16	9
Hungary	44	31	19	25	19	9
Iceland	86	89	85	34	44	29
Ireland	69	63	52	33	33	27
Italy	70	63	47	22	16	8
Luxembourg	68	69	58	65	67	55
Netherlands	80	75	62	60	55	40
Norway	85	83	69	49	51	30
Poland	28	22	14	10	8	5
Portugal	58	53	39	16	14	7
Spain	85	75	65	19	15	6
Sweden	81	88	67	50	53	36
Switzerland	74	81	66	55	57	47
U.K.	68	72	63	31	28	24
Yugoslavia	59	51	28	26	20	8

Source: European Travel Monitor; European Travel Data Center, Luxembourg for TOURCONSULT/ INTERNATIONAL EEC Project 409/90.

Notes: † Percentage of the adult population (aged 15 years and over) taking a trip of at least one night away from home.

### 3.5.2 Socio-Economic Factors

The higher the income, education and social level, the more likely Europeans are to travel, especially abroad. In some markets, the level of trip-taking is almost three times higher in the upper levels of society than the lower.

Since it is difficult to compare income and educational levels across Europe — let alone social status — the European Travel Data Center uses as its basis for socio-demographic analysis the standards recommended by ESOMAR (European Society for Opinion and Marketing Research), as defined in its Harmonisation of European Demographics.

Of the total European travellers abroad in 1990, the "middle classes" accounted for over a 50% share — due mainly to the larger size of the middle classes in most countries — while the upper and lower classes generated a 29% and 21% share of travellers respectively.

Growth in volume of travel abroad by the middle classes has also been the strongest over the last decade as a result of the increase in lower cost holiday travel packages. This is reflected by the higher than average shares of middle class travel in the more mature markets. In the less mature markets, travel abroad is still confined largely to the elite.

**Table 56**  
**Level of trip-taking across Europe by income, education and social levels**

Market	% share of population travelling in each segment, 1990					
	All travel			Foreign travel		
	Lower	Middle	Upper	Lower	Middle	Upper
Austria	39	61	78	21	42	58
Belgium	49	68	77	38	52	69
Bulgaria	35	68	82	4	12	18
Czechoslovakia	34	53	64	16	34	46
Finland	72	84	93	38	44	69
France	40	63	84	14	19	37
Germany (West)	49	67	83	27	38	56
Germany (East)	71	83	88	25	30	39
Greece	34	61	75	5	14	23
Hungary	14	30	51	5	15	33
Iceland	86	87	86	31	37	52
Ireland	47	68	87	29	35	51
Italy	48	64	81	11	17	28
Luxembourg	58	63	71	40	58	68
Netherlands	62	78	86	38	22	14
Norway	68	82	90	29	46	63
Poland	17	20	34	6	8	13
Portugal	43	71	91	8	24	45
Spain	67	83	75	7	17	22
Sweden	64	86	94	34	49	77
Switzerland	60	78	90	40	56	77
U.K.	50	70	88	16	28	50
Yugoslavia	32	59	76	10	24	38

**Source:** European Travel Monitor; European Travel Data Center Luxembourg for TOURCONSULT/INTERNATIONAL EEC Project 409/90.

**Notes:** † Percentage of the adult population (aged 15 years and over) taking a trip of at least one night away from home.

### 3.5.3 The holiday market

Tables 49 and 50 provide additional details of trip-taking and frequency for the foreign holiday travel sector.

The level of trip-taking is particularly high among first generation travellers in Belgium, Luxembourg, the Netherlands and Switzerland and low in almost all the East European markets. It is also lower than average in all those countries which are in themselves popular holiday destinations, such as Spain, Portugal, Greece, France and Italy.

Luxembourg and Switzerland have the highest levels in the 55 plus age bracket.

Among second generation travellers (aged 35-54), there are also marked differences between markets at the upper and lower ends of the scale. The levels of trip-taking in Finland and Luxembourg, for example, 57% and 62% respectively, while in France and Italy the percentages are only 17% and 12%.

Interestingly, travel frequency is often higher among third generation travellers — due largely to their greater disposable leisure time.

As far as income, education and social levels are concerned, the general trends are even more apparent in the holiday travel sector. The higher the level, the more likely it is that people will take a foreign holiday — or several holidays a year.

**Table 57**  
**Foreign holiday travel participation by age**

Market	% share of population taking a holiday abroad, 1990		
	15-34 years	35-54 years	55 plus years
Austria	41	41	28
Belgium	59	49	37
Bulgaria	3	4	1
Czechoslovakia	16	16	9
Denmark	40	38	27
Finland	50	57	33
France	20	17	13
Germany (West)	45	40	23
Germany (East)	33	31	17
Greece	10	10	7
Hungary	14	9	6
Iceland	21	21	8
Ireland	27	26	21
Italy	20	12	7
Luxembourg	59	62	51
Netherlands	56	50	38
Norway	44	44	29
Poland	5	4	2
Portugal	11	8	5
Spain	14	12	5
Sweden	43	42	30
Switzerland	53	54	46
U.K.	29	26	23
Yugoslavia	13	9	5

**Source:** European Travel Monitor 1990, European Travel Data Center Luxembourg for TOURCONSULT/INTERNATIONAL EEC Project 409/90.

**Notes:** † % of the adult population (aged 15 years and over) in each segment taking a foreign trip of at least one night away from home in 1990.

**Table 58**  
**Foreign holiday travel across Europe by socio-economic levels**

Market	% share of population taking a holiday abroad, 1990		
	Income/education/social level†		
	Lower	Middle	Upper
Austria	20	38	53
Belgium	36	48	64
Bulgaria	*	3	9
Czechoslovakia	8	24	28
Denmark	54	69	68
Finland	37	38	64
France	12	16	28
Germany (West)	26	35	53
Germany (East)	22	25	33
Greece	4	10	15
Hungary	2	8	19
Iceland	25	29	26
Ireland	16	28	39
Italy	9	14	24
Luxembourg	51	57	61
Netherlands	37	54	63
Norway	27	41	57
Poland	4	3	6
Portugal	4	17	32
Spain	5	13	18
Sweden	27	40	62
Switzerland	40	54	74
U.K.	14	27	47
Yugoslavia	4	12	17

**Source:** European Travel Monitor 1990, European Travel Data Center Luxembourg for TOURCONSULT/INTERNATIONAL EEC Project 409/90.

**Notes:** † % of the adult population (aged 15 years and over) in each segment taking a foreign trip of at least one night away from home in 1990.\* Less than 0.5%.

### 3.6 European Non-Travellers

In 1990, 40% of Europeans did not make any overnight trips at all away from home, according to the European Travel Monitor.

Economic factors seem to be the main reason for not travelling — and this is confirmed by national travel surveys conducted in the various countries. But cost is clearly not the only reason. Age plays a significant role in determining the level of trip-taking in any country, as does previous travel experience.

Table 51 highlights the difference in share of non-travellers across Europe, market by market, providing a breakdown according to age. In most markets, regardless of the overall level of trip-taking, the share of non-travellers increases with age. The rise in share is particularly marked among third generation inhabitants — the 55 years plus age bracket.

Interestingly, the pattern is slightly different among residents of most Nordic countries — Sweden, Denmark, Finland and Iceland — as well as in West Germany, Luxembourg and Switzerland. Here, the non-traveller share is slightly higher among first, rather than second generation travellers.



**Table 59**  
**Share of non-travellers across Europe by age**

Market	% share of non-travellers, 1990, aged:			
	Overall	15-34 yrs	35-54 yrs	55 plus yrs
Austria	41	33	35	56
Belgium	34	25	33	47
Bulgaria	42	30	34	66
Czechoslovakia	58	53	56	69
Denmark	37	32	31	50
Finland	17	14	11	30
France	43	33	37	55
Germany (W)	36	33	29	47
Germany (E)	18	12	12	31
Greece	44	37	43	62
Hungary	68	56	69	81
Iceland	13	14	11	15
Ireland	37	31	37	48
Italy	39	30	37	53
Luxembourg	35	32	31	42
Netherlands	26	20	25	38
Norway	21	15	17	31
Poland	78	72	78	86
Portugal	49	42	47	61
Spain	25	18	26	36
Sweden	21	19	12	33
Switzerland	25	26	19	34
Yugoslavia	51	41	49	72
U.K.	33	33	29	37

Source: European Travel Monitor 1990, European Travel Data Center, Luxembourg for  
 TOURCONSULT/ INTERNATIONAL EEC Project 409/90.

Notes: Figures have been rounded so percentages may not add up.

Income, education and social levels impact heavily on the level of trip-taking, as can be seen by Table 52. With the exception of Iceland, where there is only a marginal difference between the upper, middle and lower levels of society, all European markets reflect the same pattern in non-traveller share. The lower the income, education and social level, the higher the percentage of people who do not travel at all away from home.

In the majority of markets, the overall share of non-travellers is a few points higher than the respective share for the middle classes. But there are various exceptions to this rule of thumb. The Swedish middle classes, for example, have a much higher propensity to travel than the population overall — but the share of non-travellers is more than two-and-a-half times higher among the lower classes.

In Luxembourg, Hungary and Poland, the difference between the share of non-travellers in the upper and lower classes is very marked, and the propensity to travel is lower among the middle classes than for the population overall.

Table 60

## Share of non-travellers in Europe by income, education and social levels

Market	% share of non-travellers, 1990, by income/education/social level†			
	Overall	Lower	Middle	Upper
Austria	41	61	39	22
Belgium	34	51	32	23
Bulgaria	42	65	32	18
Czechoslovakia	58	66	47	36
Finland	17	28	16	7
France	43	60	37	17
Germany (W)	36	51	33	17
Germany (E)	18	29	17	12
Greece	44	66	39	25
Hungary	68	86	70	49
Iceland	13	14	13	14
Ireland	37	53	32	13
Italy	39	52	36	19
Luxembourg	35	42	37	29
Netherlands	26	38	22	14
Norway	21	32	18	10
Poland	78	83	80	66
Portugal	49	57	29	9
Spain	25	35	19	26
Sweden	21	36	14	6
Switzerland	25	40	22	10
U.K.	33	50	30	13
Yugoslavia	51	68	41	24

Source: European Travel Monitor 1990, European Travel Data Center, Luxembourg for TOURCONSULT/ INTERNATIONAL EEC Project 409/90.

Notes: Figures have been rounded so percentages may not add up.

### **3.7 First Trips**

Being that statistics are unavailable for first time travellers in Europe, it is difficult to produce data for the analysis in this particular area.

In the 1992 questionnaire of the European Travel Monitor an "ad hoc" question on first trippers will be introduced in order to overcome the lack of statistics on this particular subject.

However, for Italy, TOURCONSULT together with ECONSTAT was able to introduce into the questionnaire of the IOTA 1991 (Italian Outgoing Tourism Analysis) the question of whether it was the first time that the interviewee had gone abroad. The results were that 14% were first timers (while 40% low frequency, 28% medium, 18% high).

It can be estimated that for Italy by the year 2000 the leisure travel intensity may possibly rise close to 55%, in 1990, to a ceiling of 75%.

In countries where first trippers can be estimated with some accuracy and adding annual growth rate in population it would be possible to arrive at an order of magnitude sufficient to throw light on the phenomenon to better understand the growth potential of the leisure travel of the country.

### **3.8 Summary of key findings**

This comparative analysis of the levels of trip-taking and frequency of travel across Europe confirms the general trends and patterns already recognised by the industry but never before quantified on a comparative basis.

Northern Europeans are by far the most enthusiastic outbound travellers, especially those for whom foreign destinations are quickly and easily accessible by private car or other surface transport.

The level of trip-taking is much lower in southern Europe. The Mediterranean countries are popular holiday destinations in their own

right, offering plenty of sunshine and opportunities for beach holidays — which are still the favourite choice of holidays for the majority of Europeans. In addition, southern Europeans have traditionally spent their main summer holidays in their own countries.

Traditions are changing, as witnessed by the growth in outbound travel from a number of the Latin markets over the past few years. But changes do not take place overnight.

In the less mature European markets, the cost of travel is also an important deterrent to foreign holidays. This is especially true for markets located at great distances from the popular holiday destinations, like Greece and Portugal, or for which surface transport is not possible without crossing water, like Ireland. This adds significantly to the overall cost of a trip.

The vast majority of trips made by Europeans abroad are to neighbouring destinations, hence the high level of trip-taking in the Benelux countries, Switzerland and Scandinavia.

## 4. A QUALITATIVE ASSESSMENT OF TRENDS FROM THE POINT OF VIEW OF THE ORGANISED TRAVEL INDUSTRY

### 4.1 Introduction

Although the quantitative assessment of travel trends to and from Europe discussed in Chapters 2 and 3 provides some answers as to why people do or do not travel, it was necessary to supplement this with a qualitative assessment. Interviews were conducted with experts in the industry from all the different sectors to obtain a better understanding of the travel patterns and the flows and the reason as to why some people do not travel on holiday.

As will be seen later, these interviews were not able to explain satisfactorily why some people do not travel at all. More motivational research will be needed in the framework of the Commission studies in tourism.

By the way of introduction, one only has to look at developments in the past twelve months to confirm the vulnerability of the travel and tourism industry to factors completely beyond its control.

The Gulf war had an immediate and dramatic effect on both leisure and business travel and this has been exacerbated by the accompanying economic recession in many key markets. Europe's travel industry is still suffering from the consequences. With the possible exception of Germany, all outbound travel markets appear to be down on last year's level.

In the leisure sector, travel bookings through the trade seem to be the most affected, and especially the inclusive package tour market. European tour operators and retail agents are claiming that sales are down by at least 10%-15% over 1990 and in some cases, the drop is as high as 30%-50%.

There is little doubt that the industry will bounce back, but it will continue to be vulnerable to a number of outside influences. The later sections of this

Chapter cover the most important of these influences.

General trends identified by the travel and tourism industry have already been noted in discussion of individual market trends and characteristics in chapter 2.2. The following supplementary comments and conclusions have been developed through interviews with the travel trade and the different supply sectors.

A shortage relevant statistical data from the travel trade, transportation and accommodation companies, not to mention a certain reluctance on their part to disclose competitive information, means that it is possible to reconcile the results of the European Travel Monitor and other national travel surveys with industry trends. More importantly, industry trends only concern commercial sectors of the travel market, i.e. travel involving either paid accommodation or transportation. There are exceptions, such as attendance at theme parks and other attractions, but the visitor data available from these sources cannot usually be broken down into day-trippers and people staying overnight.

Despite the inadequacies of data analysis, interviews with the travel trade and other sectors of the industry have provided some interesting observations. These are considered sector by sector in the following chapters, together with a summary of the main findings.

## **4.2 Organised Travel and the impact of Trends on Travel Facilities**

### **4.2.1 Transportation**

The airline industry has suffered badly in the last twelve months, even since before the outbreak of the Gulf War. This seems to imply that the Gulf War itself was not the only factor adversely affecting air travel. Economic constraints also contributed to the market's downturn. Nevertheless, the fear of terrorism in the air and airports did cause a significant number of Europeans to change their travel plans. While some cancelled their travel completely, others clearly switched to different forms of transportation, notably coach and private car travel.

A number of the major tour operators in Europe, such as DER in Germany and Frantour in France, claim double digit growth in package tours using coach travel.

Although train travel appears to be growing in terms of overall market share, the bulk of train reservations are still made independently, so progress is very difficult to monitor. Travel agents say that rail is still not very popular for international holiday travel. Domestic bookings by rail are more important, but a big share of these, of course, are for business travellers.

As far as special promotional fares and products are concerned, there has been a growth in products and capacity - weekend discounts for travel over a Saturday/Sunday, for example - but competition after 1993 is expected to provide the real stimulus. Greater liberalisation, the trade says will encourage more airlines to offer low peak fares and package programmes around trough periods. This will probably mean more mid-week packages for all-scheduled transportation means. Regional airline transportation could be one of the sectors to benefit the most.

Europe's railways are still considering how they can expand market demand and in Great Britain and France especially, plans are being developed to stimulate the cross-Channel market with the opening of the tunnel in 1993. The ferries, meanwhile, have introduced more attractive fares to combat the expected competition.

Coach travel is also expected to grow, partly because it attracts the more price sensitive sectors of the market, but also because it is increasingly being seen as transportation means for all ages rather than just for the older segments of the population - an image has hampered its growth in the past.

#### **4.2.2 Hotels and other forms of Accommodation**

If the package tour and business travel markets are excluded, the travel trade does not appear to be very active in either promoting or marketing accommodation. One of the reasons for this is that a high 40 per cent of all commissions earned from hotel sales are not received by travel agents. So they are reluctant to spend time and effort trying to boost sales. This could



change as computer reservation systems' dependence increases around Europe. But for the time being, hotel bookings account for only about 5 per cent of the travel trade's total turnover.

The bulk of individual leisure bookings for accommodation seem to be made direct with hotels, campsites and other forms of accommodation. In fact, the growth in number of special accommodation packages that have developed in the last five years or so has come primarily from the supply sector itself rather than from the travel trade. These packages, which have registered varying success from market to market, are primarily to fill rooms at off-peak periods, notably weekends.

In some cases - and these seem to be the most successful - the accommodation sectors have joined forces with airlines, railways and other transportation companies to promote special offers. But the benefits from new business generated does not seem to have had any positive impact on the travel trade itself, as it claims it is often bypassed totally by the supply sector that sells direct to the public.

Without exception, all the independent hotels and hotel chains interviewed for the purpose of this survey state that they registered a downturn in business in 1991. Most attribute the trend primarily to the Gulf War, but there are signs that economic factors have had an even greater impact.

First class and deluxe hotels - generally the four and five star properties - have suffered more than budget and middle grade accommodation. This indicates that there has been a trading down in favour of less expensive accommodation. But it is difficult to separate out the individual trends for the business and leisure sectors of the market. As a consequence of the trend, hotel developers are increasingly looking to build two and three star accommodation and expansion of unstarred hotel accommodation is projected for the 1990s.

Social Tourism and the accommodation sector is considered separately in Chapter 8. It should be stressed, however, that representative of the commercial accommodation sectors interviewed are all extremely

concerned about the possibility of unfair competition from this sector. They believe that under-privileged sectors of the public should be aided directly - in the form of cheque-vacances, etc.. - so that they can buy the accommodation they want for holidays, rather than being allocated complimentary holidays in social tourism establishments.

#### **4.2.3 The Tour Operator Market**

As will be seen later in this chapter, generalisations regarding the tour operator market across Europe are not easy to make. In some countries, the retail trade claims that tour operator sales as a percentage of total turnover are decreasing sharply; in others, the reverse is true.

However, it is true to say that the majority of tour operators and retail travel agents interviewed - regardless of their national market - suffered a downturn in business in 1990. And the market continues to be extremely cut-throat, characterised by price wars and low margins. A large number of tour operators and retail agents collapsed during the past twelve months.

The difficult operating environment is reflected by the fact that some of the leading retail travel groups, such as Wagon-Lits, are seriously considering giving up distribution of leisure products in some markets since the returns are uneconomic. In Great Britain, Wagon-Lits is concentrating exclusively on distribution of business travel.

In other countries, however - notably in Southern Europe - leisure distribution is vital for cash flow as corporate travel accounts take so long to pay their bills.

Tour operating and retail travel are becoming increasingly concentrated as cross-border mergers and acquisitions intensify. In addition, the leading groups are increasingly looking for close collaboration in terms of marketing and product development. One example of this kind of venture is Business Travel International (BTI), which includes Havas in France, Hogg Robinson in Great Britain, Hapag Lloyd in Germany and Holland International in the Netherlands. The objective is to pool buying power so that economies of scale can be achieved.

Nevertheless, as far as tour operations are concerned, the number of small specialist operators is growing, indicating that there is still plenty of room in the market for the small niche operators. These tend to concentrate either on single destinations or destination regions, or on special sectors of the market, such as sporting holidays, cruises etc.

In general, all tour operators and travel agents interviewed claim a sharp drop in sales to the east Mediterranean destinations, to the Middle East and North Africa in 1991. Around 50 % also say that there was a return to growth for Spain, Europe's leading holiday destination for package tours that has been declining in popularity since the late 1980s.

But while the short to medium haul package sun and beach holiday market is expected to continue to dominate European international trends for the foreseeable future, the majority of tour operators say that they project stagnation in sales of this type of holiday. The short break market and the long haul sectors will show the strongest growth over the next few years, if recent experience is a good indication of short term trends.

As an example, Kuoni - one of Europe's biggest tour operators - has registered stagnation or declines in all sectors of outbound travel except long haul. This has been particularly marked in Mediterranean bordering countries such as Italy and Spain.

New product development by tour operators seems to have focused on these two sectors of the market in the past twelve months. In addition, tour operators say that there has been increasing demand for activity based holidays, although many complain that the supply sectors have not responded by offering facilities for this type of demand.

There has been a move among the travel trade to stimulate off-season travel although again, they claim they are hampered by the fact that hotels, campsites, restaurant and entertainment facilities close down in popular resorts out of season. So this discourages people from travelling during off-season periods.

One fairly recent development is the return in the trend for late booking.

This seems to emerge in times of economic difficulties as people delay making holiday plans until they are certain they can afford to go away on holiday. But leisure travel is, nonetheless, becoming more and more of a priority in some markets and late booking in these cases would appear to be more a question of trying to obtain the best prices.

Although tour operators and travel agents are not able to generalise, they say they do not feel they are stimulating new market demand since repeat bookings from clients who have bought holidays from them in the past are increasing year by year.

However, it should be added that few operators are prepared to develop new programmes and products unless they can be sure of good returns. So the non-travelling sectors of the market - which are difficult to stimulate - tend to be ignored by the travel trade.

As far as trends in use of the travel trade for holidays, there are wide differences of opinion from market to market. By and large, travel agents generally underestimate the importance of trade bookings. Several agents interviewed bemoaned the fate of the travel trade, claiming that the majority of travellers make their travel plans independently. This according to the European Travel Monitor, is not the case at all, at least for international travel. Many also believe that there has been a revival in private car travel as a result of the economic constraints on the market.

Nouvelles Frontieres is one exception to this general rule of thumb. It maintains that there has been a growth across Europe in organised travel since the mid-1980s and that as far as its own sales are concerned, the share of package tours using air travel is growing at the expense of seat only bookings and independent private car based travel.

If tour operator results are a guide to market trends, however it would seem to be the "mix-and-match" programmes that have been most successful in recent years. Operators like Travac in Switzerland, which allow clients to put together their own package from individual transport, accommodation and tour elements, have registered the strongest percentage growth in turnover.

#### 4.2.4 Conclusions

In conclusion, it should be stressed that it is very difficult to make generalisations about the tour operator market in Europe as there are such enormous variations in size and type of market - as can be seen from the analysis in Chapter 2.2.

To illustrate these variations, the total number of inclusive tour package holidays sold in Europe in 1990 was 62 mn - 52 mn for EC Europe alone, 6 mn for EFTA countries and 4 mn for Eastern Europe - according to the results of the European Travel Monitor.

The overall market is dominated by Germany and the UK which accounted for some 23 mn and 11.4 mn sales of ITs respectively. This means that Germany generated a 37% share of total European IT sales, a 40% share of sales in Western Europe, and a 44% share of EC sales. Germany and the UK together accounted for 55.5% of total European sales, 59% of all Western European sales and 66% of EC sales.

The importance of these two markets is seen more clearly alongside the shares of France (3.7 mn), Belgium (3.6 mn) and the Netherlands (3.3 mn) - in third to fifth places in the overall ranking. Italy was on sixth place with a modest share of 2.6 mn.

Not surprisingly, Germany and the UK also have the largest shares of major tour operators, notably: TUI, NUR and LTT in Germany, and Thomson, Owners Abroad and Airtours in the UK.

In most markets, there is a high degree of concentration - that has been intensifying further in the approach to 1993 and the Single European Market. In 1990, two groups in the UK controlled 60% of the local IT market and, in Germany, three groups generated a 30% share. In France, three groups controlled over 50%; in the Netherlands and Denmark, two groups held over 50%; and in the Netherlands, three groups had 40% share. In Italy, the market has remained more fragmented until now, with four groups controlling a lower 25% share of the Italian IT sector.

There are a number of reasons why the development of the IT market has been much less marked in some parts of Europe. Firstly, the potential demand is obviously much lower in countries with smaller populations: it would not have been economically viable to start up mass charter services. The geographical position of Belgium, Luxembourg, the Netherlands, etc. and the good road links to holiday destinations have also encouraged people to travel independently.

Another important reason, as already mentioned earlier, is the important volume of domestic travel and the domestic holiday patterns of the Mediterranean bordering markets, notably Spain, Portugal, Italy and France.

In the more developed northern European markets, IT charter air travel continues to dominate holiday demand; but growth in the market has been stagnant since the late-1980s. This is partly attributed to a saturation of the market, but also to factors such as pollution, congestion and the increasing desire for quality, IT packages having traditionally been synonymous with cheap, no frills holidays.

Although there is no real statistical evidence to support the claim, the majority of tour operators and retail value agents interviewed for the purposes of this study claim that there has also been a change in the basic requirements of the marketplace. Northern Europeans are becoming more actively oriented and less and less interested in simply sunning themselves on the beach for their holidays. The demand for "quality" products is also increasing and people are said to be prepared to pay more to guarantee a minimum level of quality.

In most of the Mediterranean bordering countries of Europe and in Eastern Europe, the IT market appears to be a long way from reaching its ceiling. This is illustrated by much sharper growth in demand for this type of holiday in the past few years and by new products, operators and transporters on the market.

The indications are that the availability of lower cost package holidays has both diluted the independent holiday market in southern Europe and

stimulated demand from the non-travelling public.

However since, data on first-time travellers are not available at the time of this report but surely more research will have to be carried out in the future in order to try to determine trends more clearly.

Tour operators tend to collect their own operating data but, with the exception of the UK and Germany, there is little statistical information on the industry as a whole in each country.

As broad generalisations, the following key trends have been identified by tour operators and retail travel agents in the holiday sector:

- Long haul travel sales are growing faster than short-medium haul sales;
- Congestion at airports is encouraging Europeans to consider alternative transportation modes for holiday travel, notably car, coach and rail;
- Rail travel is expected to register much sharper growth as a result of the expansion of high-speed rail networks in Europe and the opening of the Channel tunnel;
- Short break packages are gaining at the expense of those trips longer in time;
- Europeans are looking for more sporting and activity holidays and are more health conscious;
- Quality is becoming a higher priority - even if it means spending more for a holiday.

### **4.3 Major Factors Affecting Travel and Tourism**

The following summarises the major factors according to the travel trade and the different experts interviewed from the supply sector of the industry that could impact on travel trends during the current decade.

### 4.3.1 Price effects

A significant share of the last decade's changes in travel patterns can be attributed to "price effects". In the short term, such price effects are mainly due to fluctuations in exchange rates. In the longer term, general national rates of inflation and declining air travel costs - in real terms - are of greater significance.

Price increases in destination countries often have a lagged effect on outbound travel. After registering strong growth in the late-1970s, European outbound travel suffered from the general recession in the early-1980s. But individual markets did not all respond as quickly. This could have been due to the fact that the impact was not just due to the economic recession, but also to the appreciation of the U.S. dollar between 1980 and 1984 — hotel and other ground prices in many long haul destinations, of course, tend to be based on the U.S. currency.

The Swiss market, for example, was slow to react to the rising dollar and it was also much slower than West Germany and the U.K. in picking up after the recession and the mid-1980s' decline of the U.S. currency. The decline was not immediately felt by European receiving countries in 1985, either. By 1986, European inbound tourism did start to suffer but again, this could not be attributed solely to the weaker dollar. Other factors contributing significantly to the trend were the Chernobyl disaster and increased terrorism in Europe, which encouraged many Americans to cancel their holidays in Europe and stay at home.

Another price-related factor is the real estate market — falling house prices in the U.K. over the last few years, coupled with high interest rates — have impacted on U.K. outbound travel, especially among the middle classes. And the stock market crash of October 1989 also affected outbound travel temporarily, as have periodic increases in the price of crude oil, which have a direct impact on air fares and thus airline seat sales.



#### **4.3.2 Political factors**

This includes all the different taxes on travel - such as departure taxes, outbound travel taxes for residents; airport taxes; security taxes imposed by some governments, airlines and airports; foreign exchange restrictions.

As an example, the introduction of foreign exchange restrictions in France in 1983 for travel abroad had a severe and immediate impact on the volume of outbound leisure trips. The imposition of visa requirements three years later for all inbound visitors to France, with the exception of European Community and Swiss nationals, had the same effect on inbound tourism.

Similarly, the outbound charter travel tax introduced in Denmark in 1990 was considered a major contributor to declining leisure travel trends last year. And Sweden's high 25% VAT has resulted in sharp falls in room-night sales for the country's hotels.

#### **4.3.3 Terrorism**

Acts of terrorism against the air transport industry, which are probably the most important non-price factor impacting on tourism today, are clearly political, with the airlines standing as surrogate targets for governments.

#### **4.3.4 Security charges**

In some countries, airline passengers have to pay a special tax on their airline tickets to help pay for the increased security costs born by carriers and airports. Some airlines also add their own security charge. This is despite the fact that the International Air Transport Association (IATA) and other similar international organisations have lobbied vociferously against passengers being expected to finance the cost of security.

#### **4.3.5 VAT and the abolition of duty-free sales**

Two other controversial subjects of discussion and negotiation at the present time are proposals by the EC to introduce Value-Added Tax (VAT) on international air transport and to abolish duty-free sales within the European Single Market.

Although the abolition of duty-free sales is not in itself likely to discourage intra-EC travel, it could have a detrimental impact on the operating profitability of transport operators. They, in turn, would be likely to recover the loss of concession income by raising fares. At the time of writing, the indications are that the EC is in favour of delaying the abolition of duty free sales within the Community for about three to four years.

It should also be noted that there is growing concern within the travel trade regarding the impact of VAT on the agent's commissions for package tour sales. In France, where this legislation was implemented August 1991, travel agents claim that it has had a detrimental effect since the market is so price sensitive.

#### **4.3.6 Airport and airways congestion**

One of the negative effects of increased competition, which has been generated by the increasing liberalisation of air transport in Europe in the run up to 1993, is the enormous passenger traffic growth generated since the mid-1980s. This has caused severe capacity constraints which are likely to continue if growth in traffic demand over the next decade comes up to projections.

Transport by air will continue to develop in spite of economic stagnation observed in certain areas of the world.

Air traffic is expected to grow at a rate of 5% per year up to year 2010 (4.5% in U.S. travel and 5.5% for the rest of the world). This will mean that there will be a fleet of 6,000 big jet airlines to be built and 3,500 and airplanes to be replaced. Airbus has 1000 airplanes on order, Boeing over 600.000.

The number of air passengers may double in the next 15 years and this will impose active planning to develop a super-jumbo jet to carry large numbers of people early in the next century. These aircraft will have a capacity of 700 passengers plus. Boeing is planning e.g. double-deck 747, while Airbus is thinking in terms of an airplane between 600 and 800 passengers.

With these forecasts of growth, the problem in the future is likely to be not shortage of capitals but shortage of space. Pressure on airport slots, and on air lanes will intensify. A solution to this problem could be to put more passengers in fewer aircraft: it is on the basis of this thinking that airlines and airframe manufacturers are thinking as said in terms of the extra large aircraft and even larger by the year 2005.

#### **4.3.7 Health and the environment**

The most publicised health risk in recent years has been the AIDS scare. But the Chernobyl disaster also generated an enormous amount of concern, as well as a slump in East European holidays, and the reduced appeal of the Black Forest damaged by acid rain is a tangible example of environmentalism translated into a loss of tourism income.

There have been increasing concerns, too, over dirty beaches and polluted bathing waters in the Mediterranean and other popular tourist resort areas, and the decline in Mediterranean sun & beach holidays since the late-1980s is a direct result of this, not to mention the growing environmental consciousness and desire for quality.

The blooms of algae along the Adriatic coast of Italy were a dramatic proof of the threat to tourism from environmental neglect. The cost is impossible to quantify, but it was enormous. And it is clear that tourists will increasingly take care to choose a less polluted beach over a more polluted one even if they have to travel much farther. They might even shun operators and destinations that have received bad publicity over their environmental record.

It should be mentioned that a number of tour operators, notably TUI and NUR in Germany and Hoteplan have appointed Environmental Advisors to guide them on their choice of products for the increasingly environment-conscious market. Others notably the Thomson Group in Great Britain, have concentrated significantly on helping resorts upgrade and improve. Thomson also encourages its clients to be sensitive to the local environment of the destinations they visit by issuing a list of "Dos and Don'ts" which it includes in the clients ticket/package tour folders.

#### **4.3.8 Technology**

Widespread use of communication technology is opening up the tourism industry, as well as improving communications so that people are better informed about what is happening on other side of the world. This can have both negative and positive effects.

It is likely for example, that the China events of June 1989 would not have had such an impact, if people had not been able to see for themselves what was happening. The same is true for last year's events in Eastern Europe and most recently, in the Soviet Union and Yugoslavia.

At the same time, the expansion of satellite technology has delivered information to more locations and has increased speed at which information is available: as world awareness increases, so does the desire to travel. Furthermore, television programmes (there are approximately 1.5 billion television sets worldwide) increasingly relate to tourism portraying it as an adventure some and necessary escape; the vacation is presented as an integral part of modern existence.

The need to escape escalates being that modern work is highly specialized, fragmented, lacking autonomy and repetitious or routine. Travel satisfies this need to escape.

Destination data bases are widely expected to develop over the next few years. And for whoever controls them - and there is considerable debate on this subject - investment in these systems is projected to bring enormous returns and facilitate access to travel for the public at large.

#### **4.4 Conclusions**

The changes in the marketplace since the beginning of the 1980s have increased the need for market segmentation to respond to demands for travel and tourism from the different sectors.

In general, people are becoming more adventurous and activity oriented, as witnessed by the growing interest in sporting and activity holidays. While

the average holiday-maker's yearning for sunshine, allied to a certain price-sensitivity, will ensure the traditional Mediterranean favourite resorts continue to top the popularity lists, the two-week package holiday geared to lying on a beach in the sun will probably not be enough to satisfy the market's increasingly sophisticated demands. It sales can be expected to stagnate, or decline, for short haul travel, although long haul travel could become more and more organised — since it is often less expensive to take a long haul package than to try to organise such a trip independently.

Choice of destination could increasingly be determined not simply by market demand or tour operator programme availability, but by capacity restraints and bottlenecks in destination countries and on airline routes. And the European market is growing more environment-conscious and less and less willing to suffer dirty beaches and polluted waters.

The trade also believes that there will be an increasing shift away from travel to neighbouring countries in favour of travel — more and more air travel, particularly — to other European or non-European destinations. But the market will remain price-sensitive.

A positive effect of the liberalisation of air transport in Europe is the increase in competition on intra-European routes. This will clearly intensify during the 1990s.

In countries in which air travel was a prerogative of the elite as recently as the mid-1980s, air travel is finally starting to filter down to the masses. The growth is also reflected in the increased traffic through Europe's regional airports.

Nevertheless, there are still an estimated 40% of Europeans who do not travel at all. This share does, it should be noted, include East European countries, which obviously brings down the average. But the share of non-travellers in some West European countries — notably Portugal, Greece, Italy and France — is, nevertheless, at the same levels as in Eastern Europe. As far as international travel is concerned, Spain can also be counted among the least travelled nations in Europe.

In the case of all these markets, the lack of enthusiasm for travel abroad can largely be attributed to the fact that their own countries are popular destinations. They do not need to travel across borders to find sunshine as their northern European counterparts do.

This also helps to explain why so many southern Europeans do not travel away from home at all on holiday. Their friends and relations come to visit them during their vacations.

Nevertheless, a significant share of non-travellers probably would like to travel if there were no economic or timetable constraints. A number of new products could be developed and measures taken, either by local or national governments, to stimulate this sector of the population.

## 5. A COMPARATIVE ANALYSIS OF THE EVOLUTION OF EUROPEAN AND NON-EUROPEAN TRAVEL TRENDS

### 5.1 Inbound to Europe from the rest of the world

Europe accounts for around 60% of world tourism, although its share has been declining over the past ten years. This decline, however, is essentially due to a drop — or rather a slowdown in relative growth — in intra-European travel. From the rest of the world, Europe's importance as a tourist destination has continued to grow year by year.

European inbound tour operators — those who handle incoming business from overseas markets — claim that their revenues and client numbers have registered annual increases of up to 30% over the past three years. For some, the growth last year is estimated to have been close to 60%. As far as the American market was concerned, this was largely attributable to the 1990 Oberammergau Passion Play, an event which takes place only every ten years and which is a major attraction for foreign visitors. But in the case of Japan and other Asian markets, the growth seems merely to reflect an underlying demand for Europe as a destination, whether for purely leisure travel, VFR (visiting friends and relatives), or business trips.

According to preliminary indications, 1990 was a record year for visitor arrivals to Europe from overseas markets despite the outbreak of the Gulf crisis in August. Nevertheless, there is little doubt that the increase in the relative price of travel in the last quarter of the year — the result of both higher air fares following the rise in airline fuel costs and unfavourable currency fluctuations — not to mention the economic downturn and recession in some countries, and the subsequent slow but sure decline in consumer confidence, all took their toll on the final full year results. But the main impact of these developments is being felt this year.

In the majority of cases, global estimates of travel to Europe can only be extrapolated from national visitor arrivals' and outbound travel statistics. Most visitors to Europe cover more than one country on their trip and are

often counted twice by one country in Europe — such as when they use the same country as gateway and departure point. So individual destination arrivals cannot just be added together. Airline statistics, where available, cover all passengers and not just those resident in the respective source markets and visa statistics are difficult to obtain and frequently unreliable.

In 1989, the total number of visitors to Europe from outside the region was about 11.5 mn — representing a growth of some 11-12% over the previous year. Their total expenditure in Europe, exclusive of air fares, was around U.S. \$15.72 bn, or an increase of 25.3% over 1988's U.S. \$12.55 bn.

The USA is by far Europe's most important overseas market, accounting for close to two thirds of all visitors from outside the region - 7.5 mn in 1990 - and an even higher 75% of spending. Among Europe's other major inbound markets; Canada generated 1.5 mn visitors in 1991, Japan 1.2 mn, Latin America 910,000 and Australia 500,000.



**Table 61**  
**Value of the US market, 1988**

Destination	US share of hotel nights versus receipts	
	% of receipts	% of hotel nights
France	16.0	9.7
UK	19.9	15.2
Italy	15.5	6.5
Germany	10.2	14.5
Spain	4.2	2.0
Austria	6.4	2.5
Portugal	20.8	4.3
Greece	19.7	2.3
Netherlands	15.0	11.2
Denmark	11.9	8.6
Sweden	10.0	10.0
Norway	16.2	10.4
Finland	8.5	8.8

Source: OECD; ETC.

In 1989, U.S. spending in Europe topped U.S. \$12 bn, 9.1% up on 1988. This represented some U.S. \$1,750 per person per trip. Visitor arrivals rose 6.5% — following increases of 19.4% and 5.1% in 1987 and 1988 and capping a decade of growth of more than 70%, from only 4.05 mn visitors in 1979. The only year registering a decline was 1986. The Chernobyl disaster and threats of terrorism throughout Europe caused mass cancellations of American travel to the region.

What was particularly significant, too, according to the European Travel Commission (ETC), was that traffic growth was stronger in the off-peak seasons in 1989. While there was an increase of 5.1% from May to September, the average growth in the periods January to April and October to December was 8.9%. Off-peak travel from the U.S.A. to Europe now accounts for some 45% of the total for the year.

The US Travel Data Center, predicts that 1991 activity should at least reach last summer's record of 326 mn vacation trips. But private car travel is expected to increase its share to 84% of all summer vacation travel from 82% in 1990. Vacations will also be shorter and involve more stays with friends and relatives (42% of all holidays) showing that the US travellers are becoming more price conscious.

The strong performance for the market in 1989 was attributed largely to the significant appreciation of the U.S. dollar, whose buying power remained very favourable from spring well into the autumn of the year. There was also vigorous price competition between airlines in the market and France's Bicentennial celebrations were an added attraction.

Despite the warning signs of an impending recession in the U.S.A. last year and the continuous fall in the U.S. dollar, final year results showed an 8% rise in trips to Europe compared with 1989.

The Canadian market has also registered strong growth to Europe over the last decade and a higher percentage of Canadians travel to Europe, in fact, than do Americans. In 1989, trips totalled around 1.4 mn, accounting for U.S. \$1.36 mn in spending in Europe exclusive of fares.

Japan was Europe's only major overseas market that showed consistent annual growth during the 1980s, even in 1986, and has been the fastest growing market for Europe over the last five years. Some 972,313 Japanese visitors were recorded in 1989, a 17.1% increase over the previous year. This compared with an average 14.7% for outbound Japanese travel in general.

The 1989 rise in Japanese visitors to Europe was especially important as the region's share of Japanese outbound travel had been declining from 1986-88. Again, figures are not available for last year but, although travel growth is reported to have slowed in the third and fourth quarter of 1990, the market still registered a healthy increase — probably of around 10% or more to Europe. In fact, wholesalers reported a boom in end-year sales of around 20% above the same period in 1989.

While the number of outbound trips made by the Japanese fell by 16% in the

first four months of 1991 compared with the same period last year, there was a return to growth of 4% during May 1991. More significantly, advance bookings and market surveys conducted before the start of the summer season in 1991 by the European Travel Monitor indicated that Japanese outbound travel through the autumn was likely to register positive growth over 1990.

The results of a survey conducted in April 1991 by MIC - the European Travel Data Center's partner in Japan - show that Europe had declined sharply in popularity for Japanese travellers since the same time the year before and even since the beginning of 1991. North America, in contrast, gained a 4 point increase in share.

One market which did particularly well was Japanese honeymooners. Both the length of stay and spending on overseas honeymoons by Japanese has steadily increased, according to surveys conducted by Japan Travel Bureau (JTB). JTB's findings indicate clearly that Europe has almost caught up with Hawaii as the favourite destination. All other major honeymoon destinations have declined sharply since 1989.

**Table 62**

**Japan outbound travel by month, 1991**

Month	Total outbound travellers, '000	% change 1991/90
January 848	-1	
February	572	-36
March	642	-30
April	725	-13
May	832	4
<b>Total</b>	<b>3,619</b>	<b>-16</b>

Source: Japan National Tourist Organisation

Outbound travel from Japan registered a decline in the first four months of this year — notably in February and March — and was down by 16% over its

1990 level after five months. But a return to growth in May was hailed by the Japanese industry as signs of a revival in the market. The number of outbound trips during this summer is now expected to exceed last year's figures.

**Table 63**  
**Japan outbound travel by destination, 1990-91**

Destination	% share of outbound trips			
	1990	January 1991	1990	April 1991
Europe/USSR	16	17	17	11
US West coast	8	11	9	10
Other North America	6	10	9	13
Hawaii	16	14	15	
Guam/Saipan	8	6	8	9
East Asia	25	21	24	22
Southeast Asia	17	17	16	18
Oceania	9	9	9	8

**Source:** Marketing Intelligence Corporation

**Notes:** The January 1991 survey was conducted from January 17-24, just after the start of the Gulf war.

Nevertheless, the revival is not necessarily good news for Europe. A survey conducted by the Tokyo based Market Intelligence Corporation (MIC) — as part of its continuous monitor of the Japanese outbound market — indicates that Europe fell sharply out of favour with the Japanese between January and April this year. Only 11% of Japanese outbound trips were for Europe in April, compared with 17% in January and in the same month a year earlier. North America was the major destination to benefit from the decline in travel to Europe.

Furthermore, surveys by Japan Travel Bureau (JTB) indicate that there has been a dramatic decline in demand for Europe as a honeymoon destination, although all three leading destinations are losing market share in this booming sector of the market. The decline could just be a blip related primarily to the Gulf war, but only time will tell.

**Table 64**  
**Destinations of honeymoon travel from Japan, %**

	Tokyo	% market share from:		Average
		Nagoya	Osaka	
<b>Hawaii</b>				
1989	26.7	28.9	30.1	28.4
1990*	21.9	22.5	26.4	23.5
1990†	22.6	17.5	24.9	22.1
1991*	18.2	18.3	24.1	20.4
<b>Australia</b>				
1989	21.5	26.1	23.8	23.4
1990*	14.4	17.7	13.3	15.4
1990†	21.3	28.5	23.5	23.9
1991*	18.5	23.6	24.4	22.2
<b>Europe</b>				
1989	15.6	14.3	16.6	15.6
1990*	23.3	23.0	22.8	23.0
1990†	14.8	18.8	14.5	15.7
1991*	16.0	16.7	12.8	15.0

**Source:** Japan Travel Bureau (JTB)

**Notes:** \*Spring survey. †Winter survey

A note worth mentioning at this point seen from the previous two studies on the US and Japan as compared to the national travel surveys in Chapter 2.2 is that inbound travel to Europe from the rest of the world suffers much less from the seasonality that characterises much of European main holiday travel. This is further justified by the following analysis on worldwide tourism flows.

## 5.2 THE EVOLUTION OF TOURISM FLOWS IN EUROPE AND WORLDWIDE 1950-1991

### 5.2.1 Introduction

The following section seeks to provide a statistical analysis of the tourist trends in Europe in 1991 and also in the past decade (1981-1991). In order to evaluate more effectively the importance of this region in the world tourism market, the results of Europe must also be compared with those of the other regions.

In these following pages, a summary analysis has been made of international tourism flows with Europe as a destination. Furthermore an analysis has also been made of the various sub-regions of Europe showing the tourist flows from and to Central European and East European countries.

The Statistical Tables included here and in the Statistical Annex have the scope to provide statistical analysis of the trends of tourism in Europe in 1991 and in the past decade. In order to better evaluate the importance of the region in the world tourist market, the results of Europe have been compared with those of other regions.

In this section, primary interest has been given to analyse international tourist flows with Europe as a destination and between the various sub-regions. This has allowed to put into evidence the flows of tourists originating and having destination to the countries of Central Europe and Eastern Europe.

These statistics are useful to give basic quantitative elements for decisions both public and private, necessary for putting in place the strategy of the EEC in relation to the results expected from this study.

Specific tables summarize main tourist indications by country whilst the others give the evolution of tourist receipts, expenditures and the balance of tourism in the various countries of Europe.

## 5.2.2 Main Factors Which Have Determined the Evolution of Tourism

### **BEFORE 1991**

- \* The period between 1960 and 1980 has shown the highest rate of increase of arrivals and receipts of international tourism.
- \* The beginning of the 1980's has shown a regression in international travel
- \* The new growth in tourism trends started in 1984 and was interrupted in 1986 for fear of terrorism.
- \* The three last years of the 1980s has set a new record in arrivals and receipts.
- \* Recovery of travel, begun in 1984, was interrupted by the fear of terrorism in 1986.
- \* Impressive boom between 1987-1990
- \* The year 1991 registered the lowest growth rate of receipts since the second second half of the 1980s and the first drop in arrivals since 1982.

TAB. 65 WORLD - INTERNATIONAL TOURISM - 1991

(In Millions of arrivals, Billions of \$ receipts and percentages)

	ARRIVALS	RECEIPTS
TOTAL	449*	261*
% CHANGE OVER 1990	-1.4	2.3
AVERAGE ANNUAL GROWTH RATE 1981-1991	4.5	9.6

\* Provisional revised estimates

Source: World Tourism Organization (WTO)

TAB. 66                      EVOLUTION OF INTERNATIONAL TOURISM  
ARRIVALS AND RECEIPTS ON A WORLDWIDE SCALE  
1950-1990

YEARS	TOURIST ARRIVALS (Thousands)	ANNUAL VARIATION %	TOURIST RECEIPTS (1) (Millions \$)	ANNUAL VARIATION %
1950	25282	-	2100	-
1960	69296	174.09	6867	227.00
1970	159690	130.45	17900	160.67
1975	214357	34.23	40702	127.39
1980	284841	78.37	102372	151.52
1981	288848	1.41	104309	1.89
1982	286780	-0.72	98634	-5.44
1983	284173	-0.91	98395	-0.24
1984	312434	9.94	109832	11.62
1985	322723	3.29	116158	5.76
1986	330527	2.42	139234	19.87
1987	356787	7.94	170456	22.42
1988	381946	7.05	196521	15.29
1989	414223	8.45	209416	6.56
1990	429250	3.63	249300	19.05

(1) Except receipts for international transportations

Source: Elaborations of TOURCONSULT on WTO data



- \* Europe has represented 64% of the arrivals and 55% of the receipts in 1990, against 67% and 42% in 1950.
- \* The Americas have absorbed 20% of the arrivals and 26% of the receipts in 1990 against 20% and 50% respectively in 1950.
- \* East Asia and the Pacific have shown the greatest increase of the world market both at the level of arrivals and of receipts.
- \* Africa has seen its arrivals increase between 1950 and 1990 at world level whereas the receipts have remained relatively stable after their drop on the world total between 1950 and 1960.
- \* Political events in the Middle East region explain the fluctuations of this region in the total of arrivals and receipts from tourism at world level after 1980.
- \* South Asia's total of arrivals and receipts of international tourism has fluctuated by less than 1% from 1950 but this level increased after the 1980.

**TAB. 67 - SHARE OF EACH REGION OF THE TOTAL OF ARRIVALS OF INTERNATIONAL TOURISTS  
(1950 - 1990)**

(In percentage)

REGIONS	SHARES				
	1950	1960	1970	1980	1990
AFRICA	2.07	1.08	1.51	2.48	3.26
AMERICAS	29.61	24.11	22.95	18.85	19.57
E.ASIA/PACIFIC	0.75	0.98	3.04	7.01	10.83
EUROPE	66.60	72.66	70.76	68.81	64.18
MIDDLE-ORIENT	0.78	0.91	1.17	2.04	1.40
SOUTH ASIA	0.19	0.26	0.57	0.80	0.76
WORLD	100.00	100.00	100.00	100.00	100.00

Source: Elaborations of TOURCONSULT on WTO data

- \* In 1990 Europe has continued to represent the world's principle tourist market: this in spite of the fact that the percentage of total arrivals was lower than in the past whilst the tourist receipts of the region has shown a growth greater than any other region.
- \* The Americas have registered the highest rate of increase with regard to arrivals and the second best result as regards revenue in 1990.
- \* East Asia and Pacific have shown the third best record of increase in 1990 both of arrivals and receipts.
- \* The Middle East is the only region which shows a regression of tourist arrivals and receipts mainly because of the events which impacted on tourism in the region from August 1990.

**TAB. 68 - REGIONAL PERFORMANCE OF INTERNATIONAL TOURISM,**

**1985-1990**

REGIONS	RECEIPTS (Million US\$)		% CHANGE 90/89	AVERAGE ANNUAL GROWTH RATE 90/85	MARKET SHARE % OF WORLD TOTAL	
	1990	1985			1990	1985
EUROPE	136300	61181	25.04	22.2	54.67	52.67
AFRICA	5000	2601	11.63	17.7	2.17	2.23
AMERICAS	65900	33314	16.43	18.6	28.65	28.67
E.ASIA/PACIFIC	36500	12851	12.64	29.8	15.87	11.06
MIDDLE EAST	3500	4811	-29.21	-7.6	1.52	4.14
SOUTH ASIA	2100	1400	6.01	10.7	0.91	1.20
WORLD	249300	116158	19.05	21.0	100.00	100.00

TAB. 69 - REGIONAL PERFORMANCE OF INTERNATIONAL TOURISM,

1985-1990

REGIONS	ARRIVALS (Thousands)		% CHANGE	AVERAGE ANNUAL GROWTH RATE	MARKET SHARE % OF WORLD TOTAL	
	1990	1985	90/89	90/85	1990	1985
EUROPE	275500	214263	3.20	6.5	64.18	66.39
AFRICA	14000	9805	2.91	9.3	3.29	3.03
AMERICAS	84000	58728	7.07	9.4	19.76	18.19
E.ASIA/PACIFIC	46500	29408	4.76	12.1	10.94	9.11
MIDDLE EAST	6000	7979	-22.83	-6.9	1.41	2.47
SOUTH ASIA	3250	2540	6.38	6.4	0.76	0.78
WORLD	429250	322723	3.63	7.4	100.00	100.00

Source: Elaborations of TOURCONSULT on WTO data

### 5.2.3 Europe - Main factors which have determined the Evolution of Tourism in 1990

- \* Consumer revenue in continental Europe remained stable.
- \* Departures to foreign countries from the United Kingdom were relatively lower than in the past.
- \* Liberalization of trip taking in Eastern European countries.
- \* Political unrest in the Gulf area.
- \* Depreciation of the dollar.
- \* Promotional activities of national tourist administrations in the various countries of Europe which are the principle tourist originating countries.

TAB.70 - EUROPE - SELECTED INDICATORS - 1990

COUNTRIES	Population (Million)	Tourism Receipts as% of GNP	Tourist Arrivals (Thousands) 1990	Percentage Change 1990/1989	Tourism Receipts (MN US\$) 1990	Percentage Change 1990/1989	Tourism Expenditures (MN US\$) 1990	Percentage Change 1990/1989	Accom. Capacity Total 1989	OF WHICH	
										Hotels and similar Establish.	Supplem. Means of Accomm.
<b>EASTERN</b>											
Bulgaria	9.00	-	4500	4.3	394	8.8	-	-	465858	118031	347627
Czechoslovakia	15.65	0.94	8100	0.8	459	2.0	115	3.6	488068	202379	285689
Hungary	10.58	2.71	19000	33.5	850	15.2	470	-41.2	303000	69195	233805 1/
Poland	37.85	0.32	3400	3.2	266	31.7	220	2.3	835885	569785	266100 1/
Romania	23.15	0.34	5000	2.9	190	11.8	60	9.1	302600	176000	126600
USSR	288.80	0.02	7204	-7.1	270	8.0	-	-	64000	64000	-
<b>NORTHERN</b>											
Denmark	5.13	2.30	1275	4.7	2595	12.2	3768	28.5	99506	89101	10405
Finland	4.96	0.90	770	-12.7	1179	16.6	2.677	30.9	118514	92103	26411
Iceland	0.25	2.16	142	8.4	122	13.0	218	23.9	6405	6405	-
Ireland	3.51	3.70	2800	2.5	1100	2.8	1.164	17.7	45200	45200	-
Norway	4.23	1.50	1955	4.7	1402	5.5	3.152	10.7	111105	105286	5819
Sweden	8.50	1.37	731	-12.7	2887	13.6	6.102	25.4	617373	207031	410342
UK	57.20	1.34	17670	1.9	13260	18.6	19.779	30.9	1580137	1151000	429137
<b>SOUTHERN</b>											
Gibraltar	0.03	7.11	90	3.4	20	25.0	-	-	1500	1500	-
Greece	10.03	3.73	8732	8.0	2575	30.3	1.088	33.3	749739	423790	325949 1/
Italy	57.52	1.39	26679	2.9	16488	37.6	10.818	59.7	3178035	1678910	499125
Malta	0.35	18.76	872	5.3	390	4.8	110	2.8	51668	42643	9025
Portugal	10.47	6.94	8041	13.0	3400	9.7	760	15.0	437373	168437	268939
San Marino	0.02	-	450	3.0	-	-	-	-	1491	1371	120
Spain	38.81	4.36	34300	-3.0	18593	15.0	4.254	38.1	12501164	1093631	11407533
Yugoslav	23.69	3.80	7880	-8.8	2774	24.4	135	3.1	1401070	362252	1038818
Cyprus	0.69	22.18	1561	13.3	1258	27.1	165	108.9	55703	47024	8679
Turkey	56.74	3.33	4729	20.8	3346	30.9	567	0.4	140086	137301	8785
<b>WESTERN</b>											
Austria	7.62	7.44	19015	4.5	14171	52.1	6.258	24.5	1171515	656936	514579
Belgium	9.93	1.98	3163	1.9	3575	16.7	5.664	32.6	570196	92543	477653
France	56.16	0.02	50000	1.0	21651	31.2	13.476	30.9	4073180	1329740	743440
Germany	61.99	0.72	15627	6.6	10603	22.5	30.136	27.0	1655604	1118661	536943
Liechstn	0.03	-	78	1.3	-	-	-	-	1253	1191	62
Luxembourg	0.38	3.22	878	0.5	290	1.4	-	-	68249	13400	54849 1/
Monaco	0.03	-	245	-	-	-	-	-	-	-	-
Nethlnds	14.83	1.36	3600	1.6	3693	22.2	7.363	14.1	766750	109195	657555
Switzerland	6.65	3.02	12800	1.6	7179	28.9	6.039	23.1	1143815	271245	872570

1/1988

Source: Elaborations of TOURCONSULT on WTO data

- \* The arrivals of international tourists in Europe reached the level of 276,000,000 in 1990 with a yearly rate of increase of around 3.5% in the period 1980/1990. Southern Europe and Western Europe have shown a higher than the region average rate of increase between 1980 and 1990. Eastern Europe and Northern Europe have had lower results than the average of the whole European region.
- \* The receipts of international tourism in Europe have totalled a bit more than U.S. \$136 billion in 1990. Their annual rate of increase has shown on average a rate of 8.3% in the period from 1980 to 1990.
- \* Southern and Western Europe have shown approximately a 9% growth rate in this 10 year period.
- \* The sub-regions of Northern and Eastern Europe have remained under the region average with the respective rates of increase of 7.3% and 3.6%.

TAB. 71 - INTERNATIONAL TOURISM IN EUROPE  
1990

(In Thousands of arrivals, Millions of \$ of receipts and percentages)

	ARRIVALS	RECEIPTS
TOTAL	275500	136300
WORLS SHARE (%)	64.18	54.67
% VARIATION/1989	3.20	25.04
AVERAGE ANNUAL GROWTH RATE 1980-1990	3.5	8.3

Source: Elaborations of TOURCONSULT on WTO data

TAB. 72 - ARRIVALS AND RECEIPTS OF INTERNATIONAL TOURISM  
IN EUROPE - 1990  
EVOLUTION PER SUB-REGION

Tourist Arrivals 1990 (Thousands)	% Variation on 1989	Average Annual Growth Rate 80-90	European Sub-Regions	Tourist Receipts 1990 (Mn \$ECU)	% Variation on 1989	Average Annual Growth Rate 80-90
50354	10.46	2.5	East Europe	2429	11.83	3.6
25343	1.35	2.2	North Europe	22545	15.29	7.3
93334	1.70	4.3	South Europe	48844	23.98	9.3
105406	1.94	3.7	West Europe	61162	31.77	9.2
274437	3.20	3.5	Europe	134980	25.04	8.3

Source: Elaborations of TOURCONSULT on WTO data

- \* The number of international tourists in Europe has multiplied by 16 between 1950 and 1990, whereas the receipts have multiplied by 153 during the same period.
- \* Between 1950 and 1990 arrivals have grown from 70 million to 276 million whereas the receipts have grown from U.S. \$ 890 million to U.S. \$ 136 billion.
- \* Between 1960 and 1990 the progression of arrivals and receipts of tourism in Europe has been slightly lower than the world total.
- \* The arrivals have shown a rate of increase which was higher during the 1960's (8.4% on average) while the receipts have shown the most rapid progressions in the 1970's.

**TAB. 73 - EVOLUTION OF ARRIVALS AND RECEIPTS OF INTERNATIONAL TOURISM IN EUROPE, 1950 - 1990**

YEARS	TOURIST ARRIVALS (Thousands)	ANNUAL VARIATION %	TOURIST RECEIPTS (Millions \$ECU)	ANNUAL VARIATION %
1950	16839	-	890	-
1960	50351	199.01	3918	340.22
1970	113000	124.42	11200	185.86
1975	153859	36.16	26363	135.38
1980	196000	27.39	61654	133.87
1981	195289	-0.36	57240	-7.16
1982	197759	1.26	55544	-2.96
1983	192828	-2.49	55367	-0.32
1984	207628	7.68	57319	3.53
1985	214263	3.20	61181	6.74
1986	215396	0.53	77024	25.90
1987	230752	7.13	96341	25.08
1988	239347	3.72	106746	10.80
1989	266946	11.53	109007	2.12
1990	275500	3.20	136300	25.04

Source: Elaborations of TOURCONSULT on WTO data

TAB. 74 - EUROPE - MAIN TOURISM DESTINATIONS - 1980-1990

(In thousands of arrivals and percentage)

RANK 1990	COUNTRY	TOURIST ARRIVALS		RANK 1980	AVERAGE ANNUAL GROWTH RATE 1980/90	% SHARE OF ARRIVALS IN EUROPE		% SHARE OF ARRIVALS WORLDWIDE	
		1990	1980			1990	1980	1990	1980
1	FRANCE	50000(*)	30100	1	5.2	18.15	15.36	11.65	10.57
2	SPAIN	34300	23403	2	3.9	12.45	11.94	7.99	8.22
3	ITALY	26679	22087	3	1.9	9.68	11.27	6.22	7.75
4	AUSTRIA	19011	13879	4	3.2	6.90	7.08	4.43	4.87
5	UN.KINGDOM	17670	12420	5	3.6	6.41	6.34	4.12	4.36
6	GERMANY	15627	11122	6	3.5	5.67	5.67	3.64	3.90
7	SWITZERLAND	12800(*)	8873	7	3.7	4.65	4.53	2.98	3.12
8	GREECE	8732	4796	8	6.2	3.17	2.45	2.03	1.68
9	PORTUGAL	8041	2708	10	11.5	2.92	1.38	1.87	0.95
10	TURKEY	4729	921	13	17.8	1.72	0.47	1.10	0.32
11	NETHERLANDS	3600(*)	2784	9	2.6	1.31	1.42	0.84	0.98
12	BELGIUM	3163(*)	1912	12	5.2	1.15	0.98	0.74	0.67
13	IRELAND	2800	2258	11	2.2	1.02	1.15	0.65	0.79

(\*) Preliminary estimations

Source: Elaborations of TOURCONSULT on WTO data

TAB. 75 - EUROPE - MAIN SPENDERS 1980 - 1990

(In Million US\$ of expenditure and percentage)

RANK 1990	COUNTRY	TOURISM EXPENDITURES		RANK 1980	ANNUAL AVERAGE GROWTH RATE 1980/90	% SHARE OF EXPENDITURES IN EUROPE		% SHARE OF EXPENDITURES WORLDWIDE	
		1990	1980			1990	1980	1990	1980
1	GERMANY	30136	20599	1	3.9	23.93	35.22	12.98	20.78
2	UK	19779	6893	2	11.1	15.70	11.78	8.52	6.95
3	FRANCE	13476	6027	3	8.4	10.70	10.30	5.80	6.08
4	ITALY	10818	1907	9	19.0	8.59	3.26	4.66	1.92
5	NETHERLANDS	7363	4664	4	4.7	5.85	7.97	3.17	4.70
6	AUSTRIA	6258	2847	6	8.2	4.97	7.87	2.69	2.87
7	SWEDEN	6102	2235	8	10.6	4.84	3.82	2.63	2.25
8	SWITZERLAND	6039	2357	7	9.9	4.79	4.03	2.60	2.38
9	BELGIUM	5664	3272	5	5.6	4.50	5.59	2.44	3.30
10	SPAIN	4254	1229	12	13.2	3.38	2.10	1.83	1.24
11	DENMARK	3768	1560	10	9.2	2.99	2.67	1.62	1.57
12	NORWAY	3152	1310	11	9.2	2.50	2.24	1.36	1.32
13	FINLAND	2677	544	13	17.3	2.13	0.93	1.15	0.55
14	GREECE	1088	190	14	19.1	0.86	0.32	0.47	0.19

Source: Elaborations of TOURCONSULT on WTO data

**TAB. 76 - TRIPS TO EUROPE FROM MAJOR OVERSEAS  
MARKETS 1988-1989**

Market	Number of trips - '000		
	1988	1989	% change
<b>North America</b>			
USA	6,488	6,912	6.5
Canada*	1,370	1,410	2.9
<b>Asia Pacific</b>			
Japan	830	972	17.1
Australia	408	460	12.7
Hong Kong	80	157	96.3
New Zealand	90	-	-
Korea	54	77	41.5
Taiwan	30	65	116.7
Singapore	39	45	16.7
India	42	-	-
Philippines	32	-	-
Thailand	25	-	-
<b>Latin America</b>			
Brazil	242	277	14.3
Argentina	103	108	4.9
Venezuela	99	98	-1.5
Mexico	85	93	9.5
Colombia	28	30	7.6
Chile	25	26	5.6
Uruguay	22	20	-10.0
<b>Other</b>			
Israel	150	-	-
South Africa	120	-	-

+ Estimated. \* Canada total includes trips to Eastern Europe... not available.  
Figures have been rounded which may cause some distortion.



- \* Intra regional tourist flows have represented around 82% of the total of arrivals in Europe in 1989.
- \* Total arrivals have reached 219 million against 143 million in 1980 (73% of the total).
- \* Intra regional travel originating in Eastern Europe has increased by 62% in the period 1980-1989, reaching approximately 52 million in 1989, whilst intra regional flows originating in the rest of Europe have reached 168 million during the same year (1989), i.e. a growth of nearly 51% vis-à-vis 1980.
- \* North America has contributed on the order of 7.4% of the total arrivals in Europe during 1989 as against 5.9% in 1980. The rest of the American continent shows a decrease in tourist flows with destinations to Europe in the period 1980-1989.
- \* The strong increase of arrivals originating from South East Asia and the Pacific (around 79% between 1980-1989) is essential due to Japan which represents between 55 and 71% of tourist flows from this region towards Europe in the period 1980-1989.

TABLE 77 - EVOLUTION OF INTRA AND INTERREGIONAL TOURISM IN EUROPE  
1980-1990

(In thousands of arrivals)

ORIGIN	Inter-Regional	DEPARTURES		North America	DEPARTURES		Japan	Australia	Africa	Latin America and Caribbean	East Asia/Pacific 1	Middle East
		East Europe	Rest of Europe		Canada	USA						
<b>TOWARDS EUROPE</b>												
1980	143544	31925	111618	11527	1588	9968	1741	1021	3634	1853	3055	3254
1985	168037	37672	130365	20663	2558	18105	2391	1367	4220	1823	4056	3757
1986	176276	42809	133467	13715	2175	11539	2440	1239	4174	2105	3972	4106
1988	206281	51819	154462	15735	2263	13751	3431	1274	5272	1892	5003	4459
1989	219237	51862	168075	17050	2504	14546	3916	1251	5340	1616	5460	4481
<b>ANNUAL VARIATION (%)</b>												
85/80	17.1	18.0	16.8	79.3	61.1	81.6	37.3	33.9	16.1	-1.6	32.8	15.5
86/85	4.9	13.6	2.4	-33.6	-15.0	-36.3	2.0	-9.4	-1.1	15.5	-2.1	9.3
88/86	17.0	21.0	15.7	14.7	4.0	19.2	40.6	2.8	26.3	-10.1	26.0	8.6
89/88	6.3	0.1	8.8	8.4	10.6	5.8	14.1	-1.8	1.6	-14.6	9.1	0.5
89/80	52.7	62.4	50.6	47.9	57.7	45.9	124.9	22.5	46.9	-12.8	78.7	37.7
<b>TOTAL EUROPEAN SHARE (%)</b>												
1980	73.0	16.3	56.9	5.9	0.8	5.1	0.9	0.5	1.8	0.9	1.6	1.7
1985	78.4	17.6	60.8	9.6	1.2	8.4	1.1	0.6	2.0	0.8	1.9	1.7
1986	81.8	19.8	62.0	5.4	1.0	5.4	1.1	0.6	1.9	1.0	1.8	1.9
1988	86.2	21.7	64.5	6.6	1.0	5.6	1.4	0.5	2.2	0.8	2.1	1.9
1989	82.4	19.4	63.0	6.4	0.9	5.4	1.5	0.5	2.0	0.6	2.0	1.7

1: Including Australia and Japan

Source: Elaborations of TOURCONSULT on WTO data

TABLE 78 - OUTBOUND TRAVEL FROM EUROPE

1980-1990

(In thousands of arrivals)

ORIGIN	ARRIVALS FROM EUROPE						Average Annual Growth Rate	
	1980	Share of outbound %	1985	Share of outbound %	1990	Share of outbound %	85/80	90/80
AFRICA	3634	2.3	4220	2.3	5595	2.2	3.0	4.4
AMERICAS	5814	3.7	5891	3.2	10950	4.3	0.3	6.5
EAST ASIA/PACIFIC	2357	1.5	3507	1.9	6450	2.5	8.3	10.6
MIDDLE EAST	2052	1.3	3167	1.7	4925	1.9	9.1	9.1
SOUTH ASIA	764	0.5	782	0.4	1195	0.5	0.5	4.6
SUB - TOTAL	14621	9.2	17567	9.5	29115	11.3	3.7	7.1
EUROPE	143545	90.8	168037	90.5	227685	88.7	3.2	4.7
WORLD TOTAL	158166	100.0	185604	100.0	256800	100.0	3.3	5.0

Source: Elaborations of TOURCONSULT on WTO data

**TAB. 79 - SHARE OF EUROPE IN LONG-HAUL ARRIVALS (1)  
FOR SELECTED DESTINATIONS, 1980-1989**

(In thousands of arrivals)

DESTINATION	ARRIVALS FROM EUROPE 1980	% OF EUROPE IN LONG-HAUL ARRIVALS	ARRIVALS FROM EUROPE 1989	% OF EUROPE IN LONG-HAUL ARRIVALS	% CHANGE 80/89
<b>AFRICA</b>	3634	53.20	5340	49.32	46.9
Morocco	971	86.16	1272	52.24	30.9
Tunisia	1109	94.95	1671	94.57	50.7
Egypt	494	46.43	1062	52.14	114.9
<b>AMERICAS</b>	5814	41.88	10111	46.88	73.9
USA	3400	57.97	6251	54.97	83.9
Canada	1180	70.36	1616	60.89	37.0
Mexico	481	92.86	157	87.71	-67.2
Caribbean	643	9.68	1072	10.95	66.7
Argentina	-	-	223	71.94	-
Brazil	173	80.84	319	81.59	83.9
Peru	122	70.12	136	84.47	11.2
<b>EAP</b>	2538	50.09	5792	52.89	118.2
Australia	245	57.92	531	58.35	117.2
China	104	44.44	394	52.74	279.6
Hong Kong	343	37.36	715	41.43	108.1
Indonesia	184	68.66	383	76.14	108.1
Japan	255	35.27	455	37.60	78.3
Korea	48	25.13	172	18.24	255.2
Macau	152	35.85	187	56.16	23.2
Malaysia	173	47.66	228	29.42	31.8
New Zealand	61	32.28	146	35.69	140.6
Philippines	110	29.33	110	19.35	2.5
Singapore	378	53.32	901	53.98	138.1
Taiwan	58	27.62	111	17.65	91.5
Thailand	513	59.65	1107	59.71	116.0
<b>SOUTH ASIA</b>	764	38.22	1144	54.92	49.7
India	312	47.27	632	52.67	102.3
Sri Lanka	219	79.35	120	73.62	-45.0
<b>MIDDLE EAST</b>	2052	45.37	5420	59.99	164.1
Jordan	140	20.35	127	13.77	-8.8
Israel	647	61.97	696	62.20	7.5

(1) Long-haul arrivals: Interregional arrivals

Source: Elaborations of TOURCONSULT on WTO data.

TAB. 80 - MATRIX OF INTERNATIONAL TOURISM FLOWS FROM EUROPE TO OTHER REGIONS OF THE WORLD - 1989

(In thousands of arrivals and percentage)

ORIGIN	Europe	Share of Total %	Eastern Europe	Share of Total %	Northern Europe	Share of Total %	Southern Europe	Share of Total %	Western Europe	Share of Total %
DESTINATION										
EUROPE	219938	88.8	42377	96.9	40901	80.9	31591	89.2	105079	89.0
AFRICA	5340	2.2	543	0.1	888	1.8	953	2.7	3445	2.9
AMERICAS	10111	4.1	300	0.7	4132	8.2	1287	3.6	4392	3.7
EAST ASIA/PACIFIC	5793	2.3	356	0.8	2485	4.9	551	1.6	2401	2.0
MIDDLE EAST	5420	2.2	559	1.3	1677	3.3	893	2.5	2291	1.9
SOUTH ASIA	1144	0.5	68	0.2	462	0.9	159	0.5	455	0.4
TOTAL	247746	100.0	43714	100.0	50545	100.0	35423	100.0	118063	100.0
% SHARE OF EUROPE IN ARRIVALS AT DESTINATION										
EUROPE	84.4		16.3		15.7		12.1		40.3	
AFRICA	33.3		0.04		5.5		5.9		21.5	
AMERICAS	12.9		0.4		5.3		1.6		5.6	
EAST ASIA/PACIFIC	13.0		0.1		5.6		1.2		5.4	
MIDDLE EAST	45.9		4.7		14.2		7.6		19.4	
SOUTH ASIA	37.6		2.2		15.2		5.2		15.0	

Source: Elaborations of TOURCONSULT on WTO data

- \* International tourism in the Eastern European countries is largely dominated by travel between the countries of the sub-region which have represented on an average more than 70% of the arrivals between 1980 and 1989.
- \* Hungary, Poland and Czechoslovakia have represented the main tourist destinations during the 1980s. The arrivals originating from East Europe have been predominant in these three countries, reaching respectively 64%, 78% and 88% in 1989.
- \* In the period 1980/1989 intra regional tourist traffic has diminished in Hungary, Poland and Czechoslovakia while it has increased in Bulgaria, Rumania and USSR.

**TAB. 81 - TRENDS OF TOURIST ARRIVALS FROM EAST EUROPE  
AND THE REST OF EUROPE TO EAST EUROPEAN COUNTRIES  
1980-1985-1989**

(In thousands of arrivals)

ORIGIN DESTINATION	EAST EUROPE			REST OF EUROPE			MARKET SHARE - % OF TOTAL ARRIVALS					
							EAST EUROPE			REST OF EUROPE		
	1980	1985	1989	1980	1985	1989	1980	1985	1989	1980	1985	1989
BULGARIA 1/	1657	2014	3026	1395	1998	2027	30.2	27.6	36.8	25.4	27.4	24.7
CZECHOSLAVAKIA	17197	14731	26252	1170	1491	2969	92.2	89.2	88.4	6.3	9.0	10.0
HUNGARY	7476	7095	9048	1785	2387	4806	79.4	72.9	63.6	18.9	24.5	33.76
POLAND	6107	2538	6397	792	715	1457	86.2	73.9	77.7	11.2	20.8	17.7
ROMANIA	4340	3271	3867	2189	1339	773	64.4	68.5	79.7	32.5	28.1	15.9
USSR	1364	2448	5148	1670	1299	1487	39.3	56.4	66.4	48.2	29.9	19.2
TOTAL	38141	32096	53738	9001	9228	13990	75.2	69.7	73.6	17.8	20.0	19.2

1/ Excluding arrivals from Turkey

Source: Elaborations of TOURCONSULT on WTO data

**TAB. 82 - EAST EUROPEAN COUNTRIES -  
TOURIST ARRIVALS FROM SELECTED COUNTRIES  
1980-1989**

DESTINATION ORIGIN	BULGARIA 1/					CZECHOSLOVAKIA 1/				
	1980	% of total arrivals	1989	% of total arrivals	average annual variation (%) 1980-1989	1980	% of total arrivals	1989	% of total arrivals	average annual variation (%) 1980-1989
AUSTRIA	29388	0.54	55701	0.68	7.4	261928	1.42	349799	1.18	3.3
FRANCE	67134	1.22	32760	0.40	-7.7	32360	0.17	44747	0.15	3.7
GERMANY	166408	3.03	236887	2.88	4.0	434587	2.35	753715	2.54	6.3
ITALY	25807	0.47	30614	0.37	1.9	69641	0.38	157831	0.53	9.5
SCANDINAVIA	45386	0.83	69408	0.84	4.8	80424	0.43	116891	0.39	4.2
SWITZERLAND	8560	0.16	9081	0.11	0.7	18629	0.10	37399	0.13	8.0
UN. KINGDOM	42865	0.78	96592	1.17	9.4	19441	0.11	39894	0.13	8.3
YUGOSLAVIA	775783	14.14	1221995	14.86	5.2	165175	0.89	1271645	4.28	25.4
N. AMERICA	12186	0.22	15215	0.19	2.5	-	-	-	-	-
CANADA	1500	0.03	2409	0.03	5.4	-	-	-	-	-
USA	10686	0.19	12806	0.16	2.0	41000	0.22	80000	0.27	7.7
JAPAN	5000	0.09	5709	0.7	1.5	-	-	-	-	-
ALL COUNTRIES	5485787	100.0	8294985	100.0	4.7	18503415	100.0	29683211	100.0	5.4

1/: Including excursion travellers and visitors in transit

Source: Elaborations of TOURCONSULT on WTO data

**TAB. 83 - EAST EUROPEAN COUNTRIES -  
TOURIST ARRIVALS FROM SELECTED COUNTRIES  
1980-1989**

DESTINATION ORIGIN	HUNGARY					POLAND 1/				
	1980	% of total arrivals	1989	% of total arrivals	average annual variation (%) 1980-1989	1980	% of total arrivals	1989	% of total arrivals	average annual variation (%) 1980-1989
AUSTRIA	346600	3.68	1281000	8.99	15.6	37530	0.53	75500	0.92	8.1
FRANCE	35000	0.37	63556	0.45	6.8	68805	0.97	74800	0.91	0.9
GERMANY	414000	4.39	1575706	11.07	16.0	279304	3.94	649600	7.89	9.8
ITALY	66000	0.70	248772	1.75	15.9	34718	0.49	59700	0.73	6.2
SCANDINAVIA	37000	0.39	208924	1.47	21.2	142024	2.00	227000	2.76	5.3
SWITZERLAND	30000	0.32	79011	0.56	15.9	9290	0.13	8000	0.10	-1.6
UN. KINGDOM	24000	0.25	69657	0.49	12.6	38540	0.54	46000	0.56	2.0
YUGOSLAVIA	709000	7.53	1375000	9.66	7.6	87067	1.23	248000	3.01	12.3
N. AMERICA	63000	0.67	195677	1.37	13.4	48217	0.68	114700	1.39	0.1
CANADA	13000	0.14	35555	0.25	11.8	8395	0.12	18400	0.22	9.1
USA	50000	0.53	160122	1.12	13.8	39822	0.56	96300	1.17	10.3
JAPAN	-	-	27146	0.19	-	8492	0.12	13100	0.16	4.9
ALL COUNTRIES	9413000	100.0	14236000	100.0	4.7	7086690	100.0	8232000	100.0	1.7

1/: Including excursion travellers and visitors in transit

Source: Elaborations of TOURCONSULT on WTO data

**TAB. 84 - EAST EUROPEAN COUNTRIES -  
TOURIST ARRIVALS FROM SELECTED COUNTRIES  
1980-1989**

DESTINATION ORIGIN	ROMANIA					USSR				
	1980	% of total arrivals	1989	% of total arrivals	average annual variation (%) 1980-1989	1980	% of total arrivals	1989	% of total arrivals	average annual variation (%) 1980-1989
AUSTRIA	34600	0.51	15200	0.31	-8.7	26300	0.76	30900	0.40	1.8
FRANCE	53400	0.79	13000	0.27	-14.5	93400	2.69	82246	1.06	-1.4
GERMANY	226900	3.37	115600	2.38	-7.2	161300	4.65	234048	3.02	4.2
ITALY	39600	0.59	32800	0.68	-2.1	63700	1.84	99904	1.29	5.1
SCANDINAVIA	56100	0.83	14800	0.31	-13.7	1118700	32.28	847293	10.93	-3.0
SWITZERLAND	9500	0.14	4500	0.09	-8.0	13600	0.39	20874	0.27	4.9
UN. KINGDOM	84200	1.25	18600	0.38	-15.4	42700	1.23	88948	1.45	8.5
YUGOSLAVIA	1531400	22.71	430000	8.86	-13.1	61300	1.77	89300	1.15	4.3
N. AMERICA	22800	0.34	28600	0.59	2.5	46200	1.33	200337	2.58	17.7
CANADA	3100	0.05	3900	0.08	2.6	8600	0.25	19860	0.26	9.7
USA	19700	0.29	24700	0.51	2.5	37600	1.09	180477	2.33	19.0
JAPAN	4700	0.07	8000	0.16	6.1	40600	1.17	51637	0.67	2.7
ALL COUNTRIES	6742000	100.0	4852000	100.0	-3.6	3465400	100.0	7752326	100.0	9.3

Source: Elaborations of TOURCONSULT on WTO data

**5.2.4 Trends of Outbound Travel from Selected Countries Worldwide and in the Various Regions**

**Trends of Outbound Travel from Selected Countries of Europe and Having as a Destination:**

- **AFRICA**
- **AMERICAS**
- **ASIA/OCEANIA (excluding Western Asia)**
- **WESTERN ASIA**



**TAB. 85 - TRENDS OF OUTBOUND TRAVEL FROM SELECTED COUNTRIES WORLDWIDE AND IN THE VARIOUS REGIONS**  
1990

(Basis: Arrivals at destination)

DESTINATION ORIGIN	AFRICA			AMERICAS			ASIA		
	% of total AFRICA	arrivals (thousands)	% of total departures	% of total AMERICAS	arrivals (thousands)	% of total departures	% of total ASIA	arrivals (thousands)	% of total departures
AUSTRIA	1.75	98	1.48	1.48	150	2.26	3.61	399	6.00
BELGIUM	2.45	137	1.18	1.59	161	1.39	1.70	188	1.63
FRANCE	32.14	1796	9.32	15.26	1542	8.00	11.59	1281	6.65
GERMANY	21.29	1190	2.07	17.62	1781	3.11	22.09	2442	4.26
ITALY	9.32	521	2.64	6.92	700	3.54	6.66	737	3.73
NETHERLANDS	3.04	170	1.03	5.49	555	3.37	5.37	594	3.61
SPAIN	7.67	429	4.06	4.60	465	4.40	1.88	208	1.97
SCANDINAVIA	2.86	160	1.01	7.91	800	5.05	10.04	1110	7.01
SWITZERLAND	4.04	226	1.97	4.76	481	4.20	4.95	547	4.78
UN.KINGDOM	15.39	860	2.37	34.33	3469	9.57	32.07	3544	9.77
TOTAL	100.00	5587	2.72	100.00	10104	4.93	100.00	11050	5.39

NOTE: The Table is to be read as follows: In 1990 Austria generated 98000 arrivals in Africa i.e. 1.75 per cent of total arrivals in Africa. These 98000 arrivals represented 1.48 per cent of total departures from Austria to worldwide.

Source: Elaborations of TOURCONSULT on WTO data

**TAB. 86 - TRENDS OF OUTBOUND TRAVEL FROM SELECTED COUNTRIES WORLDWIDE AND IN THE VARIOUS REGIONS**

1990

(Basis: Arrivals at destination)

DESTINATION ORIGIN	AUSTRALASIA (1)			EUROPE			WORLD		
	% of total AUSTRALASIA	arrivals (thousands)	% of total departures	% of total EUROPE	arrivals (thousands)	% of total departures	% of total WORLD	arrivals (thousands)	% of total departures
AUSTRIA	1.88	13	0.20	3.36	5984	90.06	3.23	6644	100.00
BELGIUM	0.72	5	0.04	0.62	11069	95.76	5.63	11559	100.00
FRANCE	3.90	27	0.14	8.21	14599	75.76	.94	19271	100.00
GERMANY	14.47	100	0.17	29.16	51827	90.37	28.45	57352	100.00
ITALY	3.61	25	0.13	9.99	17766	89.93	9.62	19755	100.00
NETHERLANDS	4.05	28	0.17	19.43	15108	91.81	8.02	16455	100.00
SPAIN	0.72	5	0.05	5.32	9461	89.51	5.15	10570	100.00
SCANDINAVIA	9.84	68	0.43	7.75	13778	87.03	7.71	15831	100.00
SWITZERLAND	6.22	43	0.38	5.71	10148	88.64	31.57	11449	100.00
UN.KINGDOM	54.55	377	1.04	15.74	27982	77.17	17.67	36259	100.00
TOTAL	100.00	691	0.33	100.00	177722	86.63	100.00	205145	100.00

(1) Australia and New Zealand

Source: Elaborations of TOURCONSULT on WTO data

TAB. 87 - TRENDS OF OUTBOUND TRAVEL FROM SELECTED COUNTRIES TO AFRICA

1990

(Basis: Arrivals at destination)

DESTINATION ORIGIN	NORTHERN AFRICA			MAROCCO			TUNISIA		
	% of total NTH AFRICA	arrivals (thousands)	% of total departures	% of total MAROCCO	arrivals (thousands)	% of total departures	% of total TUNISIA	arrivals (thousands)	% of total departures
AUSTRIA	2.33	97	98.98	1.38	16	16.33	2.31	39	39.80
BELGIUM	2.89	120	87.59	2.50	29	21.17	4.38	74	54.01
FRANCE	30.74	1276	71.05	38.99	452	25.17	27.16	458	25.50
GERMANY	21.85	907	76.22	13.89	161	13.53	28.41	479	40.25
ITALY	9.27	385	73.90	6.90	80	15.36	11.20	189	36.28
NETHERLANDS	3.46	144	84.71	2.50	29	17.06	5.75	97	57.06
SPAIN	10.09	419	97.67	18.20	211	49.18	2.01	34	7.93
SCANDINAVIA	3.46	144	77.14	5.43	63	39.38	4.56	77	48.13
SWITZERLAND	3.87	131	57.96	2.50	29	12.83	2.84	48	21.24
UN.KINGDOM	12.69	527	61.28	7.67	89	10.35	11.32	191	22.21
TOTAL	100.00	4150	74.28	100.00	1159	20.74	100.00	1686	30.17

NOTE: The Table is to be read as follows: In 1990 Austria generated 97000 arrivals to Nth. Africa i.e. 2.33 per cent of total arrivals in North Africa.

These 97000 arrivals represented 98.98 per cent of total departures from Austria to Africa.

Source: Elaborations of TOURCONSULT on WTO data

TAB. 88 - TRENDS OF OUTBOUND TRAVEL FROM SELECTED COUNTRIES TO AFRICA

1990

(Basis: Arrivals at destination)

DESTINATION ORIGIN	EGYPT			AFRICA-SOUTH OF THE SAHARA			AFRICA		
	% of total EGYPT	arrivals (thousands)	% of total departures	% of total STH AFRICA	arrivals (thousands)	% of total departures	% of total AFRICA	arrivals (thousands)	% of total departures
AUSTRIA	4.51	31	31.63	0.06	1	0.02	1.75	98	100.00
BELGIUM	-	-	-	1.11	16	11.68	2.45	137	100.00
FRANCE	22.70	156	8.69	36.21	520	28.95	32.14	1796	100.00
GERMANY	27.65	190	15.97	19.70	283	23.78	21.29	1190	100.00
ITALY	13.10	90	17.27	9.47	136	26.10	9.32	521	100.00
NETHERLANDS	-	-	-	1.81	26	15.29	3.04	170	100.00
SPAIN	5.38	37	8.62	0.69	10	2.33	7.67	429	100.00
SCANDINAVIA	-	-	-	1.11	16	22.86	2.86	160	100.00
SWITZERLAND	4.80	33	14.60	6.61	95	42.04	4.04	226	100.00
UN.KINGDOM	21.83	150	17.44	23.18	333	38.72	15.39	860	100.00
TOTAL	100.00	687	12.30	100.00	1436	25.70	100.00	5587	100.00

Source: Elaborations of TOURCONSULT on WTO data

TAB. 89 - TRENDS OF OUTBOUND TRAVEL FROM SELECTED COUNTRIES TO THE AMERICAS

1990

(Basis: Arrivals at destination)

DESTINATION ORIGIN	NORTHERN AMERICA			USA			MEXICO			CARIBBEAN		
	% of total NTH AMERICA	Arrivals (thousands)	% of total departures	% of total USA	arrivals (thousands)	% of total departures	% of total MEXICO	Arrivals (thousands)	% of total departures	% of total CARIBBEAN	Arrivals (thousands)	% of total departures
AUSTRIA	1.64	128	85.33	1.69	106	6.06	1.85	3	2.00	0.43	5	3.33
BELGIUM	1.83	143	88.82	1.83	115	4.21	1.85	3	1.86	0.17	2	1.24
FRANCE	12.48	971	62.97	11.31	708	2.71	31.48	51	3.31	33.44	386	25.03
GERMANY	18.06	1405	78.89	18.10	1133	6.28	18.51	30	1.68	11.00	127	7.13
ITALY	6.15	476	68.00	6.05	379	4.21	10.49	17	2.43	3.46	40	5.71
NETHERLANDS	4.60	358	64.50	4.31	270	4.93	3.08	5	0.90	7.88	91	16.40
SPAIN	3.06	238	51.18	3.46	217	3.23	13.58	22	4.73	4.24	49	10.54
SCANDINAVIA	9.30	724	90.50	10.21	639	9.98	3.70	6	0.75	3.64	42	5.25
SWITZERLAND	4.80	374	77.75	4.72	296	7.92	6.17	10	2.08	1.82	21	4.37
UN.KINGDOM	38.08	2963	85.41	38.27	2395	11.22	9.26	15	0.43	33.88	391	11.27
TOTAL	100.00	7780	77.00	100.00	6258	61.93	100.00	162	1.60	100.00	1154	11.42

NOTE: The Table is to be read as follows: In 1990 Austria generated 128000 arrivals in North America i.e. 1.64 per cent of total arrivals in North America. These 128000 arrivals represented 85.33 per cent of total departures from Austria to The Americas

Source: Elaborations of TOURCONSULT on WTO data

TAB. 90 - TRENDS OF OUTBOUND TRAVEL FROM SELECTED COUNTRIES TO THE AMERICAS

1990

(Basis: Arrivals at destination)

DESTINATION ORIGIN	CENTRAL AMERICA			SOUTH AMERICA			AMERICAS		
	% of total C.AMERICA	arrivals (thousands)	% of total departures	% of total S. AMERICA	arrivals (thousands)	% of total departures	% of total AMERICAS	arrivals (thousands)	% of total departures
AUSTRIA	1.26	4	2.67	1.52	13	8.67	1.48	150	100.00
BELGIUM	1.58	5	3.11	1.28	11	6.83	1.59	161	100.00
FRANCE	22.46	71	4.60	13.36	114	7.39	15.26	1542	100.00
GERMANY	20.56	65	3.65	21.57	184	10.33	17.62	1781	100.00
ITALY	12.97	41	5.86	16.76	143	20.43	6.92	700	100.00
NETHERLANDS	5.69	18	3.24	10.31	88	15.86	5.49	555	100.00
SPAIN	14.55	46	9.89	15.47	132	28.39	4.60	465	100.00
SCANDINAVIA	2.53	8	1.00	3.04	26	3.25	7.91	800	100.00
SWITZERLAND	5.69	18	3.74	7.85	67	13.93	4.76	481	100.00
UN.KINGDOM	12.65	40	1.15	8.79	75	2.16	34.33	3469	100.00
TOTAL	100.00	316	3.12	100.00	853	8.44	100.00	10104	100.00

(I) Including Mexico

Source: Elaborations of TOURCONSULT on WTO data

TAB. 91 - TRENDS OF OUTBOUND TRAVEL FROM SELECTED COUNTRIES TO ASIA/OCEANIA (1)

1990

(Basis: Arrivals at destination)

DESTINATION ORIGIN	EASTERN/S. EASTERN ASIA			CHINA			HONG KONG		
	% of total E/S. EA	arrivals (thousands)	% of total departures	% of total CHINA	arrivals (thousands)	% of total departures	% of total HONG KONG	arrivals (thousands)	% of total departures
AUSTRIA	2.52	125000	75.76	-	-	-	2.51	18000	10.91
BELGIUM	1.41	70000	73.68	-	-	-	1.67	12000	12.63
FRANCE	12.41	615000	75.83	19.84	50000	6.17	11.60	83000	10.23
GERMANY	17.43	864000	74.29	21.03	53000	4.56	16.64	119000	12.07
ITALY	7.38	366000	70.11	10.31	26000	4.98	8.81	63000	8.37
NETHERLANDS	6.7	332000	81.77	5.55	14000	3.45	4.75	34000	12.90
SPAIN	1.35	67000	54.03	1.98	5000	4.03	2.23	16000	10.18
SCANDINAVIA	8.17	405000	79.26	4.36	11000	2.15	7.27	52000	9.65
SWITZERLAND	6.23	309000	76.49	5.95	15000	3.71	5.45	39000	10.58
UN.KINGDOM	36.36	1802000	68.34	30.95	78000	2.96	39.02	279000	1.26
TOTAL	100.00	4955000	72.46	100.00	252000	3.68	100.00	715000	10.46

(1) Excluding Western Asia

Source: Elaborations of TOURCONSULT on WTO data

Note: The table is to be read as follows:

In 1990 Austria generated 125000 arrivals in Eastern/S.Eastern Asia, i.e. 2.52 per cent of total arrivals in Eastern/S.Eastern Asia.

These 125000 arrivals represented 75.76 per cent of total departures from Austria to ASIA/OCEANIA.

TAB. 92 - TRENDS OF OUTBOUND TRAVEL FROM SELECTED COUNTRIES TO ASIA/OCEANIA (1)

1990

(Basis: Arrivals at destination)

DESTINATION ORIGIN	JAPAN			KOREA			INDONESIA		
	% of total JAPAN	arrivals (thousands)	% of total departures	% of total KOREA	arrivals (thousands)	% of total departures	% of total INDONESIA	arrivals (thousands)	% of total departures
AUSTRIA	0.19	9000	5.45	2.83	4000	2.42	3.17	12000	7.27
BELGIUM	0.17	8000	8.42	2.12	3000	3.16	2.64	10000	10.53
FRANCE	1.10	51000	6.29	12.76	18000	2.22	12.69	48000	5.92
GERMANY	1.40	65000	5.59	21.98	31000	2.67	20.37	77000	6.62
ITALY	0.64	30000	5.75	7.09	10000	1.92	11.11	42000	8.05
NETHERLANDS	0.37	17000	4.19	7.80	11000	2.71	19.84	75000	18.47
SPAIN	0.28	13000	10.48	3.54	5000	4.03	-	-	-
SCANDINAVIA	0.84	39000	7.63	11.34	16000	3.13	1.32	5000	0.98
SWITZERLAND	0.38	18000	4.46	4.96	7000	1.73	7.67	29000	7.18
UN.KINGDOM	4.61	214000	8.12	25.53	36000	1.37	21.16	80000	3.03
TOTAL	100.00	464000	6.78	100.00	141000	2.06	100.00	378000	5.53

(1) Excluding Western Asia

Source: Elaborations of TOURCONSULT on WTO data

TAB. 93 - TRENDS OF OUTBOUND TRAVEL FROM SELECTED COUNTRIES TO ASIA/OCEANIA (1)

1990

(Basis: Arrivals at destination)

DESTINATION ORIGIN	THAILAND			SOUTHERN ASIA			INDIA			SRI LANKA		
	% of total	Arrivals	% of total departures	% of total	Arrivals	% of total departures	% of total	Arrivals	% of total departures	% of total	Arrivals	% of total departures
AUSTRIA	4.28	49000	29.70	2.40	27000	16.36	1.66	10000	0.06	4.62	5000	3.03
BELGIUM	2.18	25000	26.32	1.68	19000	20.00	2.15	13000	13.68	2.77	3000	3.16
FRANCE	18.19	108000	25.65	12.00	35000	16.65	13.45	81000	9.99	17.59	19000	2.34
GERMANY	21.34	144000	20.98	16.62	87000	16.08	13.62	82000	7.05	25.00	27000	2.32
ITALY	8.83	101000	19.35	11.11	25000	23.95	8.97	54000	10.34	13.88	15000	2.87
NETHERLANDS	5.16	59000	14.53	4.08	46000	11.33	4.15	25000	6.16	5.55	6000	1.48
SPAIN	2.18	25000	20.16	2.84	32000	25.81	3.32	20000	16.13	0.92	1000	0.81
SCANDINAVIA	12.07	38000	27.01	5.60	63000	12.33	5.14	31000	6.07	2.77	3000	0.59
SWITZERLAND	7.43	85000	21.04	5.24	59000	14.60	5.81	35000	8.66	2.77	3000	0.74
UN.KINGDOM	18.28	109000	7.93	38.40	32000	16.39	41.69	151000	9.52	24.07	26000	0.99
TOTAL	100.00	1143000	16.72	100.00	1125000	16.45	100.00	602000	8.80	100.00	108000	1.58

(1) Excluding Western Asia

Source: Elaborations of TOURCONSULT on WTO data

TAB. 94 - TRENDS OF OUTBOUND TRAVEL FROM SELECTED COUNTRIES TO ASIA/OCEANIA (1)

1990

(Basis: Arrivals at destination)

DESTINATION ORIGIN	OCEANIA			AUSTRALIA			ASIA/OCEANIA		
	% of total	arrivals (thousands)	% of total departures	% of total	arrivals (thousands)	% of total departures	% of total	arrivals (thousands)	% of total departures
AUSTRIA	1.73	13000	7.88	1.87	10000	6.06	2.41	165000	0.06
BELGIUM	0.66	5000	5.26	0.74	4000	4.21	1.38	95000	13.68
FRANCE	8.15	61000	7.52	4.12	22000	2.71	11.86	811000	9.99
GERMANY	14.97	112000	9.63	13.67	73000	6.28	17.00	1163000	7.05
ITALY	4.14	31000	5.94	4.12	22000	4.21	7.63	522000	10.34
NETHERLANDS	3.74	28000	6.90	3.74	20000	4.93	5.94	406000	6.16
SPAIN	0.80	6000	4.84	0.74	4000	3.23	1.81	124000	16.13
SCANDINAVIA	5.74	43000	8.42	9.55	51000	9.98	7.47	511000	6.07
SWITZERLAND	6.14	46000	11.39	5.99	32000	7.92	5.90	404000	8.66
UN.KINGDOM	53.87	403000	15.29	55.43	296000	11.22	38.56	2637000	9.52
TOTAL	100.00	748000	10.93	100.00	534000	7.80	100.00	6838000	100.00

(1) Excluding Western Asia

Source: Elaborations of TOURCONSULT on WTO data

**TAB. 95 - TRENDS OF OUTBOUND TRAVEL FROM SELECTED COUNTRIES TO WESTERN ASIA**  
**1990**  
 (Basis: Arrivals at destination)

DESTINATION ORIGIN	CYPRUS			ISRAEL			JORDAN		
	% of total	arrivals (thousands)	% of total	% of total	arrivals (thousands)	% of total	% of total	arrivals (thousands)	% of total
	CYPRUS		departures	ISRAEL		departures	JORDAN		departures
AUSTRIA	2.37	29	11.60	3.16	17	6.80	7.36	7	2.80
BELGIUM	1.47	18	16.22	3.72	20	18.02	2.1	2	1.80
FRANCE	1.96	24	4.66	21.97	118	22.91	11.57	11	2.14
GERMANY	8.18	100	8.00	18.25	98	7.84	20	19	1.52
ITALY	0.73	9	3.83	6.33	34	14.47	18.94	18	7.66
NETHERLANDS	2.45	30	13.33	5.21	28	12.44	3.15	3	1.33
SPAIN	-	-	-	2.98	16	17.78	7.36	7	7.78
SCANDINAVIA	22.50	275	41.98	11.36	61	9.31	11.57	11	1.68
SWITZERLAND	3.68	45	24.73	5.77	31	17.03	2.1	2	1.10
UN.KINGDOM	56.62	692	57.91	21.22	114	9.54	15.78	15	1.26
TOTAL	100.00	1222	25.95	100.00	537	11.42	100.00	95	2.01

Source: Elaborations of TOURCONSULT on OWT data

Note: The table is to be read as follows:

In 1990 Austria generated 29000 arrivals in Cyprus, i.e. 2.37 per cent of total arrivals in Cyprus.

These 29000 arrivals represented 11.60 per cent of total departures from Austria to Western Asia.

**TAB. 96 - TRENDS OF OUTBOUND TRAVEL FROM SELECTED COUNTRIES TO WESTERN ASIA**  
**1990**  
 (Basis: Arrivals at destination)

DESTINATION ORIGIN	SYRIA			TURKEY			WEST ASIA		
	% of total	arrivals (thousands)	% of total	% of total	arrivals (thousands)	% of total	% of total	arrivals (thousands)	% of total
	SYRIA		departures	TURKEY		departures	WEST ASIA		departures
AUSTRIA	4.65	2	0.80	7.57	197	78.80	5.31	250	100.00
BELGIUM	16.27	7	0.90	2.15	56	50.45	2.35	111	100.00
FRANCE	11.62	5	0.97	11.95	311	60.39	10.93	515	100.00
GERMANY	25.58	11	0.88	37.43	974	77.92	26.55	1250	100.00
ITALY	9.30	4	1.70	5.99	156	66.38	5.99	235	100.00
NETHERLANDS	4.65	2	0.89	5.76	150	66.67	5.77	225	100.00
SPAIN	4.65	2	2.22	2.38	62	68.89	1.91	90	100.00
SCANDINAVIA	13.95	6	0.92	11.10	289	44.12	13.91	655	100.00
SWITZERLAND	2.32	1	0.55	2.92	76	41.76	3.86	182	100.00
UN.KINGDOM	6.97	3	0.25	12.72	331	29.37	25.38	1195	100.00
TOTAL	100.00	43	0.91	100.00	2602	55.26	100.00	4708	100.00

Source: Elaborations of TOURCONSULT on WTO data

TAB. 97 - U.S. CITIZEN DEPARTURES - 1990 Estimates

DESTINATION	1990 0	% CHANGE 1990/1989	% CHANGE 1990/1985
EUROPE	7,465	8%	16%
CARIBBEAN	3,941	6%	24%
ASIA	2,073	7%	41%
S. AMERICA	817	-4%	47%
CENTRAL AMERICA	720	20%	84%
OCEANIA	583	12%	76%
M. EAST	200	-2%	-20%
AFRICA	50	4%	-56%
CANADA	12,664	-2%	5%
MEXICO	15,560	9%	49%
OVERSEAS	15,849	7.2%	25%
<b>TOTAL ALL COUNTRIES</b>	<b>44,073</b>	<b>6%</b>	<b>25%</b>

Source: Elaborations TOURCONSULT on U.S. Travel and Tourism Administration.

TAB. 98 - U.S. OUTBOUND TRAVELLERS BY DESTINATION

	1987 (%)	1988 (%)	1989 (%)	1990 (%)
E ASIA	26	25	25	22
SE ASIA	14	14	16	16
USA W/C	9	9	9	8
N AMERICA	11	10	9	9
HAWAII	16	17	16	16
GUAM/SAIPAN	7	7	7	8
OCEANIA	3	7	6	8
<b>EUROPE/USSR</b>	<b>19</b>	<b>16</b>	<b>18</b>	<b>18</b>

## 6. The Disadvantaged Traveller - Why the habitual stay-at-homes?

Although the quantitative and qualitative analyses in this report explain the fluctuations in tourism growth trends, they do not answer the question as to why some Europeans never, or very rarely take a leisure trip away from home.

Interviews with experts in the travel industry, both on the supply and the demand side, agree that the major reason some Europeans are habitual stay-at-homes is an economic one. As an example, in Italy, individuals for whom "economic motivations" represent the principal obstacle to holiday taking are over 9 mn, representing 1/3 of all those who do not go on holiday. To these should be added, in order of importance, "Family reasons" (5.6 mn in Italy) and the "lack of habit to go on holiday", which represents a consistent share of the non-holiday takers.

There are also people who do not consider holidays as a leisure priority.

But these are not the only reasons. Others include family ties, health, and a shortage of accommodation capacity at times when some people are obliged to take their holidays. This last reason obviously affects the lower income segments the most.

Furthermore, there is a group equally numerous of people who do not go on holiday because of working reasons either of their own or of other components of the family (e.g. if the head of the family does not take his holidays, his wife and even grown children will not go on holiday). This particular aspect of phenomenon much reflects the characteristics which are peculiar of the family nucleus and not of the single individual.

In the category of age of non-holiday takers, it is "economic reasons" that prevail in all the classes of age, with the exception of the extremely young (less than 10 years of age, in which case it is family reasons which prevail) and the elderly people of over 65 years for which the major reason is the "lack of habit" or physical disabilities.



Reasons of work have effects being obviously more substantial for the people of working age (25-54 years), while the "lack of habit" motive increases with the increase of age, an effect contrary to that of "family reasons" which shows an opposite delineation. Finally the fact of living already in tourist resorts, which is often the case in Mediterranean countries, constitutes a hindrance to holiday taking.

## 6.1 Age factors

Age plays a major contributory role, although this is much less significant in some countries than others, as well as among the middle and upper social levels — as was shown in Chapter 3. Moreover, there are already signs that tomorrow's senior citizens — those who will be around 60 and over by the turn of the century — are going to be very different in their travel habits from their parents at the same age, and even senior citizens of today.

The travel trade is well aware of the ageing of the European population, but there appear to be misconceptions as to what the 55-plus age sector of the market is looking for in the way of holiday products and services. Perhaps their needs are not so very different from those of people in their 40s.

A significant share of Europeans approaching retirement have already travelled quite widely, both in their own countries and abroad. When they do reach retirement, not only will they have much more disposable time on their hands — assuming their national pension coffers are not depleted before then — they will also be much more eager to travel.

The travel patterns and behaviour of tomorrow's senior citizens — the 65-plus bracket of the years 2000 and 2010 — were the subject of a recent study by Germany's Studienkreis für Tourismus. The study, which was in fact a re-analysis of historic travel trends from 1975 to the present day, demonstrates clearly that the travel behaviour of retired Germans is dictated almost entirely by their travel habits earlier in life. Travellers do not change their habits in their declining years.

**Table 99****Projections for Germany's future senior citizen\* travellers**

	Travellers aged 65-75 years		
	1990	2000	2010
Level of trip-taking, %	53	63	74
Travellers, mn	5.9	8.9	11.2
<b>Destination — main holiday trip, %</b>			
Domestic	51	39	28
Abroad	49	61	72
Of which:			
Austria	8	10	10
Italy	10	10	11
Spain	8	10	13
Others	23	31	38
<b>Organisation — main holiday trip, %</b>			
Tour operator	36	37	37
Independent	64	63	63

**Source:** Interviews with Studienkreis für Tourismus — Reiseanalyse.

**Notes:** \* Former West German travellers.

As a result of its re-analysis, Studienkreis für Tourismus projects that the level of trip-taking among senior citizens in Germany will increase sharply to around 74% by the year 2010, and the foreign share of main holiday trips will rise from its current 49% to 72% over the period.

Favourite destinations close to home may lose market share but this should be more than balanced by the increase in absolute arrivals. As an example, around 470,000 Germans aged 65-75 currently spend their main vacation in Austria. This should rise to 1.1 mn in 20 years time — and tomorrow's market will be better educated and higher spending.

Among the recommendations in the report is a warning to the travel

industry not to build "ghettos" for elderly travellers. This is not appreciated by "members" of this age group and will be even less appreciated in the future. So it could discourage elderly citizens to switch away from organised travel.

**Table 100**

**French holiday travel by age group, summer 1990+ (% share of total trips)**

<i>Domestic versus international trips</i>		
<b>Age group</b>	<b>Domestic</b>	<b>International</b>
Total population	78.5	21.5
60 plus years	71.0	29.0
35-59 years	79.7	20.3
15-34 years	81.9	18.1
<i>Organised versus independent trips</i>		
	<b>Independent</b>	<b>IT or partially organised</b>
Total population	62.2	37.8
60 plus years	52.6	47.4
35-59 years	65.2	34.8
15-34 years	67.1	32.9

**Source:** SOFRES

**Notes:** + April to September 1990 inclusive. \* Trips of 1-3 nights. † Trips of 4+ nights.

Another study by SOFRES in France — where the level of trip-taking is much lower than in most major markets — demonstrates that French senior citizens are less enthusiastic leisure travellers than their younger compatriots. But they are more likely to travel abroad and take an organised or semi-organised holiday. Some 29% of all trips taken by the 60 plus age group are international, compared with the national average of 21.5%.

More significantly — at least, as far as the trade is concerned — close to 70% of their travel is outside the July and August summer peaks as against only 40% for the 15-34 year olds.

## 6.2 A natural ceiling

In some of Europe's major travel markets, the level of trip-taking appears to be reaching a ceiling. There are few first-time travellers.

Moreover, the travel trade believes that future growth is much more likely to come from an increased number of trips per trip-taker, and notably from travel abroad. The immature markets, by and large — and those in which there is substantial untapped growth — are markets which have a low foreign level of trip-taking, like Portugal, Spain, Greece, Italy and France.

## 6.3 The disabled

The disabled, of which there are some 50 mn in the European Community, are one sector of the population for whom little appears to have been done to encourage and support tourism growth, except in the transport and accommodation sectors.

Most international hotel groups do cater specifically for the disabled who are only able to move around in wheel-chairs, as do airlines and railways. But tour operators are rarely able to handle disabled customers. Travel for these people is very much the domain of special organisations that organise group tours. Many disabled people do not want to travel in the company of other people with their own handicaps — they would like to be able to participate in a normal holiday programme.

There have been numerous discussions, both at national and Community level on the subject of what can be done to ease travel for the disabled, although little seems to have been done so far. However, various proposals are currently under consideration, including the sponsorship of a guide book listing facilities for disabled travellers.

The National Tourism Boards in Britain have worked hard to develop the market for people with special needs (disabled people and those with other disadvantages) under the general campaign title of "Tourism for All". A booklet giving design advice and practical suggestions for making

accommodation premises accessible to disabled people has been distributed to over 20,000 operators in Britain and a conference reviewing best practice in tourism provision for the disabled people in Europe was organised by the English Tourist Board, (ETB) with EC support.

High Priority is given to advising tourism providers on how they can make their premises more accessible in the broadest sense to people with special needs.

ETB has piloted a scheme for two years to provide holidays at very low cost for families or others on low incomes utilising capacity at hotels, guest houses and visitor attractions during the off-peak period. The principle operated is that voluntary agencies identify groups of people unable to take holidays because of low income (typically disabled people, lone parent families and elderly people) in a particular town and coach transport is provided to take them to the holiday destination where the groups are deliberately mixed and integrated. The coach company, accommodation providers and visitor attractions offer their facilities at a considerably reduced sum for the holiday. The scheme has been immensely successful and will be developed in the future.

International Cooperation to assist the disabled traveller has been seen within the frame of the European Year of Tourism (EYT) 1991 and a special pan-European project on tourism for the disabled people was carried through by the STB in cooperation with the English, Finnish and Norwegian Tourist Boards. The project culminated with a "Tourism for All" Conference in Gatwick with some 200 participants from 18 different countries.

#### **6.4 Industrial and school holiday constraints**

Millions of Europeans at the lower income and social levels are unable to go away on holiday, since company closures during July and/or August oblige them to travel during the peak summer travel period, but there is insufficient capacity in the lower cost holiday villages and clubs to accommodate them.

Furthermore, in the Mediterranean countries — notably France, Italy, Spain and Greece — the supply side of the industry remains almost totally geared to the domestic market. Most mountain ski resorts close down promptly at the end of the Easter holidays — regardless of when Easter occurs. And some coastal resorts link their opening to the start of the local school holidays, too.

In Portugal, banks have gone as far as to offer higher salaries to staff willing to take their holidays in January and February. But it has proved very difficult to change people's travel habits overnight and even those people who are not obliged to take their main holidays during the peak July and August summer season tend to do so.

If there has been any real improvement in seasonal flows, it is more to do with the fact that people are travelling in greater numbers abroad than they were ten years ago. So those that choose a foreign destination for their main trip — which is increasingly likely to be in winter or off-season than summer — are still having their traditional domestic holiday, but are spending less time away in the peak summer months than they used to.

The staggering of school holidays has been introduced by most European countries. But it is still not satisfactory. In France, for example, disagreements over the annual school calendar have been going on for years. The current calendar, which came into effect in September 1990, provides for the staggering of the mid-term spring break (around February-March and divided into two separate zones) and the spring holidays (from March 11 to May 13, 1991). There is no staggering as far as the summer school holidays are concerned — which ran from July 7 to September 10 in 1991.

Although the educators in France approve of the current system, because it provides children with a balanced work:relaxation calendar (of around seven weeks work followed by two weeks holiday during the year), there were strong objections this year to the new calendar from the tourism sector and the travelling public. The spring holidays did not coincide with Easter (March 31) and so most of the winter sports' resorts were already closed when the spring holidays started — even though there was still good snow

in the mountains. At the same time, many of the popular coastal resorts had not yet opened for business.

In addition, the staggering of school holidays into only two zones rather than three — as was the case over many previous years since holidays were first staggered in the late-1960s — created greater traffic problems on the roads.

## **7. Expected market trends in the 1990s**

### **7.1 Introduction**

Throughout this report reference is made as to the expectations for the remainder of the 1990s for each market and the factors which will effect travel in the future in light of the analysis of the available data, and of the interviews of the opinion leaders. Therefore this chapter only seeks to highlight the most important of these expected future travel trends up to the year 2000 and includes a special look at the forcasted developments in the international market.

### **7.2 Forecasts for tourist trends**

As far as expected trends for the 1990s are concerned, unless much is done for the significant share of the population classified here as "non-travellers", it is unlikely that the growth in the market will come from an increase in the number of trip takers, that is first trips. Rather, a growth will be seen in the increase in the number of trips taken by the existing trip-takers.

In addition, the analyses show that the number of nights spent on holiday have stagnated showing a growth in the number of trips taken each year. The future should see the number of trips taken by each trip taker increasing with the duration of each trip decreasing.

From the preceding chapters we have seen that certain traditions have held their own in determining the evolution of travel in the European market. For example, the level of the southern European market has a relatively low travel intensity which, as has been discussed earlier in this report, is due to their own countries being popular in nature as a holiday destination. And, in terms of inbound travel to these markets, the past has shown that the traditional sun and beach holidays have always been a favourite of the Europeans. Yet, although, the traditional summer IT sun & beach package still accounts for the biggest share of total leisure travel sales, traditions seem to be changing.



The demand for the remainder of the Nineties will be for a more adventurous and active holiday including sports and many other growing or never before seen types of holidays which will further be discussed in chapter 8 when suggestions are given for the types new products that should be implemented in the future.

This does not mean that in the 90s the traditional type holiday shall no longer be in demand, on the contrary, the traditional Mediterranean favourite resorts will continue to be very popular as a choice of destination, yet the market will see increasingly sophisticated demands for a newer and more health and activity oriented holiday package.

A continuing growth, yet, will be seen for "non-sun" short and medium-haul destinations that will further outpace that of the traditional Mediterranean "sun, sand and sea" resorts. Furthermore, as seen from the analysis, summer holiday travel has actually been growing more slowly than winter travel in the 1980s, especially in terms of nights spent abroad.

Although the travel trade will see a marked decline in the sales of these IT packages there has been a steady rise in the use of the travel trade for holiday bookings. And, it could be that the long haul package sales may increase as the public looks for new destinations to satisfy new forms of demand, and would find it difficult to organise such an elaborate vacation independently. This has been shown earlier in the analysis as long haul travel has gained at the expense of holidays to short and medium-haul destinations. As a result, IT sales can be expected to stagnate, or decline, for short haul travel.

The European market is growing more environment-conscious and will continue to look farther away from home for less polluted vacation spots and places which offer a more adventurous type of holiday. This choice of destination will also, however, be determined by the continual capacity restraints and congestion of airport traffic of the previous favourite destinations.

With the increase of long haul travel, air travel will also see a growth yet the air traffic and congestion, as mentioned earlier, may put large restraints

on the choice of destination. Even so, air travel, will become more and more popular also with the lower economic classes. The growth will reflect in the increased traffic through Europe's regional airports, and with the increased competition on intra-European routes - all this will intensify in the 1990s. As a result, Car-based travel, which as of now dominates the outbound leisure travel market, should loose more ground in the favour of air travel.

In addition, Short breaks should show faster growth than holidays of four nights or more in the up-coming years as everyday constraints such as work and school are not permitting of long holidays and people are looking more and more to break from work or school and will do so even if only for a short while.

Changing demographics will also have an impact on travel demand. In the 1980s, there were fewer marriages and couples had fewer children. In larger cities now, single person households account for as much as 50% of all households. More wives are working now, too, so that younger couples can afford to travel more than they used to. The rising level of education is also of significance. Around 60% of school-leavers have completed their college entrance examinations and the number of students attending institutes of higher education has tripled since the 1970s.

But perhaps the greatest changes in the market are not so much demographic as psychological in nature. Personal values, such as having fun, relaxation and self-fulfilment, are becoming more important, according to the travel trade. These and other trends identified by the experts were discussed in Chapter 4.

With increasing leisure time - a shorter working week, more part-time employment and more flexible working hours - the average European consumer of tomorrow and therefore, the average European holiday-maker, will have very little in common with his counterpart of 20 or even ten years ago.

The major growth in travel in Europe in the past years was seen from North to South. Yet the 1980s had shown the travel demand to be

increasing from southern Europe and has developed much more strongly than in the past - this can be expected to continue in the 1990s.

In terms of outside the EC one can expect that, because of changing economic and political factors, a much stronger percentage rate of growth to and from Eastern Europe between now and the year 2000.

As far as the international market goes, regarding Europe as a destination, Europe can be expected to maintain its popularity as a destination as can be seen in Chapter 5. Yet other destinations will also show strong increases in receipts as well. The regions which will have the greater increase in arrivals will probably be Asia/Oceania, the Americas and Africa at the expense of Europe which may see its share of international tourism arrivals diminishing from about 64% in 1989 to around 53% by the year 2000. The forecasts indicate that Asia/Oceania will have the best performance in international tourism and that, in this region, international tourism arrivals will grow from 10.7% in 1989 to around 22% by the year 2000.

The total of arrivals of international tourists in the world have been forecast to 515 million in 1995 and 637 million by the year 2000. This is on the condition that economic development, as well as other political, commercial and social factors which have influenced tourism during the Eighties, shall substantially remain the same.

The global receipts of international tourism should increase at approximately 8% reaching U.S. \$ 527 billion by the year 2000, with Europe gradually diminishing its share of worldwide receipts to 43% in 1995 and to 39% in the Year 2000.

Therefore the the 1990s will see significant changes in the demand for new types of products and the modifications to the existing products on the current market. These will be discussed in the following Chapter.

**TAV.101 - FORECASTS OF INTERNATIONAL TOURISM  
AND SHARE OF THE DIFFERENT COUNTRIES  
1995-2000**

REGIONS	FORECASTS		SHARE OF WORLWIDE TOTAL	
	1995	2000	1995	2000
<b>WORLD</b>				
Arrivals (mn)	515	637	100.00	100.00
Receipts (\$Mn)	343	527	100.00	100.00
<b>AFRICA</b>				
Arrivals (mn)	23	32	4.4	5.0
Receipts (\$Mn)	10	14	2.9	2.7
<b>AMERICAS</b>				
Arrivals (mn)	103	128	20.1	20.1
Receipts (\$Mn)	95	146	26.9	27.8
<b>EUROPE</b>				
Arrivals (mn)	294	338	57.2	53.0
Receipts (\$Mn)	152	206	43.0	39.0
<b>ASIA/OCEANIA</b>				
Arrivals (mn)	95	140	18.4	21.9
Receipts (\$Mn)	86	161	24.4	30.5

Source: Elaborations of TOURCONSULT on WTO data

## 8. A STRATEGY FOR EUROPE - THE PRODUCTS

### 8.1 Introduction

Forecasts for travel between now and the end of this century project enormous growth. For EC inhabitants alone, an additional 1 bn bed-nights are expected to be generated by the year 2000.

There is little justification, therefore, in investing efforts in trying to stimulate the overall market further. Nevertheless, efforts do need to be taken — both by the public and private sectors — to try to improve the seasonal balance of tourism flows to prevent increased congestion and pollution. These and other factors of hindrance which constitute the suitability of the supply of the industry are first discussed in this Chapter and the suggested modifications to the marketplace and its products.

In addition, much can be done to facilitate travel for people who either do not have the money to go on holiday, or who are unable to travel for a variety of reasons.

The basic analysis confirms the shift from quantity towards quality in European tourism, in a time of sudden international changes, as Europe integrates, and during which period it is more than able to retain its key share of world tourism.

The increased economic benefit to host societies, through tourism, can be desirably achieved via an increased per capita expenditure of tourists, not just by the increase of tourist numbers. There is a range of segmented demands for a wide range of new products of variable scale, awaiting to be met, and this issue as well as those mentioned above shall be addressed this Chapter as well as a presentation of selected innovative products already implemented on the European market.

## **8.2 Suitability of supply and modifications to existing products**

### **8.2.1 Failure to address the major issues**

Contrary to popular opinion, there has been wide range of new products and programmes introduced on the market over the last few years in Europe. These have both helped to stimulate travel and tourism to less developed regions and to encourage a better off-season utilisation of facilities.

However, most of these new products have been targeted at people who already travel at least once a year away from home for holidays or other leisure purposes. Few have addressed the issue of people not travelling at all.

The result has been an increase in number of trips per person travelling and notably, an increase in trips abroad. But the share of Europe's population that does not travel has changed very little.

The following are some of the main reasons for the unsuitability of supply as a stimulator of first-time travellers and suggestions for improvement in these areas:

### **8.2.2 Seasonal imbalances**

Seasonal imbalances of supply are clearly a major factor discouraging leisure travel. Even if people want to travel, they are constrained by school holidays and work holiday patterns. In addition, the imbalance in demand causes big price variations between peak and off-peak products and services.

It is significant that Europe's leading travel and tourism group, Club Méditerranée, says it would be able to reduce peak season prices significantly if it could reduce seasonal peaks and troughs in demand.\*

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\* For a more detailed discussion on seasonality please refer to "All-Season Tourism: Analysis of Experience, Suitable Products and Clientele (Ref 415)" of the Study for the Commission of the European Communities.

It is not easy to reconstruct the seasonality of the various types of tourism and understand what characteristics it will show in the medium and long term future.

However, we can pin point some general rules and some trends given the past experience.

As a General rules we can say that:

- 1) The seasonality of business and tourist cities in Central Europe is more evenly distributed vis-à-vis that of Southern Europe;
- 2) The seasonality of business tourism and/or convention tourism has a trend which is opposite to beach or mountain tourism;
- 3) The seasonality of foreigners visiting Mediterranean countries of Europe is rather evenly distributed over eight months (March-October), complementary accommodation facilities have the highest concentration;
- 4) The seasonality of outgoing tourists from Southern Europe is more evenly distributed vis-à-vis to the flows of domestic tourists inside their own country and the seasonality of thermal tourism, art tourism and agri-tourism has similar trends;
- 5) In the weekend period the various segments of leisure tourism show important and strong flows.

In addition, past trends show that:

- 6) A general flattening of seasonality of all types of tourism has been ascertained, even if with different importance and modalities;
- 7) A more evenly spread tourism can be seen in new tourism forms such as agri-tourism, health tourism, cultural tourism;

- 8) Some types of tourism (beach, mountain) tend to a greater distribution of people in the periods which precede those of maximum concentration (anticipated seasonality);
- 9) The outgoing flows have become constantly less concentrated.
- 10) In order to achieve a seasonality with a better distribution over the year, infrastructure and service are more important than climatic factors.

Some indications of general character are that the slow phenomenon of deseasonalisation depends on second and third holidays during the same year and, as a consequence, we can see that potentially this phenomenon could have an even greater influence in the future.

In general the problem of seasonality in Europe is accompanied by that of a more balanced distribution of tourists over the territory of each country. However, for the scope of an evaluation of possible public Government and private actions to be implemented, it must be recognised that in certain cases seasonality must be accepted and coped with in different ways.

Inside this limit, to think that one can overcome the obstacles favouring other types of tourism by shifting tourists elsewhere (e.g. in the hinterland) has demonstrated to be an error being that each type of tourism has its own rule and not all types of tourists can be integrated.

We see objective limits inside each tourism segment. Various measures can be taken which can dilute, in time, seasonality: it would already be important, for example, to extend the presence of beach tourists to four summer months instead of just July and August.

Finally, it should not be forgotten that in most countries of Europe the problem is less dramatic than it seems as the situation of real saturation occurs only a few periods in July and August and is limited to beach and mountain tourism.



### 8.2.3 Youth and senior citizen markets

Young people aged 15-24 account for some 16% of the total population in EC member countries, or around 51 mn. Like the senior citizen market, the youth market was for a long time ignored by the travel trade, but there is increasing recognition as to its untapped potential.

Many of the programmes designed specifically for the youth market are educational in content. These include exchange programmes between students and schoolchildren from different countries to encourage the improvement of language skills and group language tour programmes.

One difficulty, however, is the seasonality of demand. School holidays are the peak months for holiday travel, so the availability of cheap products for the underprivileged classes is obviously limited. Hence the reason why this type of youth programme does not tend to attract the lower income groups.

As far as the senior citizen market is concerned, there appears to be a misconception in the industry about the type of products and services suitable for people of retirement age. In the minds of many tour operators and hoteliers, everyone over the age of 55 is looking for the same type of products and services.

Recent studies have shown, as has been discussed earlier in this report, that today's 50-60 year olds are very different from their counterparts 20 and even ten years ago. In fact, their needs are probably very little different from those of people 10-15 years younger.

Relevant products, already adapted at national levels for this sector are listed in the following section for innovative products.

Some of the products already incorporated on the market are badly in need of improvement and are underdeveloped as far as promotional and standards of supply go. Having upgraded such products the market could expect to stimulate travel in those who are now classified as non-travellers. Some examples of which are as follows:

### 8.2.4 Social tourism

Social tourism has not been as successful as it should have been given the enormous efforts invested by governments and individual organisations in some countries.

One of the main problems has been the resistance from the commercial accommodation sector which maintains that subsidised holiday accommodation constitutes unfair competition. Another problem has been that many of the establishments that come under the social tourism label have not been operated professionally and, therefore, have not been profitable ventures.\*

Many are now in need of modernisation and upgrading, too, and substantial funding is being sought from the government and the European Commission to help diversify the offer and improve quality.

An imbalance of tourism demand also contributes to poor utilisation of facilities. UNAT (Union des Associations de Tourisme et de Plein Air) — a body which groups together a number of organisations responsible for social tourism in France — claims that its members cannot satisfy 35% of holiday demand during the peak summer season because of a shortage of accommodation capacity. UNAT has a collective capacity of 240,000 beds in holiday centres for children, 260,000 beds in holiday camps and 300,000 beds in camping/caravanning sites. It claims that if school holidays were better spread out, the number of holiday-makers and annual holidays would increase by several million.

A number of selected social tourism products are listed in the following section on innovative products.

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\* For a more detailed examination of Social Tourism another Commissioned study is underway entitled Social Tourism: Components of the Various concepts of Social Tourism. Evolution in Facilities and in demand (Ref 411/90)

### **8.2.5 Health tourism/Thermalism**

Europe's spa and health resort potential is still under-developed and under-promoted. The sector has traditionally been viewed as either for the elite of the market, or as an answer to medical problems, with costs being reimbursable by the state. So the resorts have not been widely commercialised. As an example, of the 104 resorts in France, only 18 attract more than 10,000 clients a year.

Another problem is that sales of holidays/stays in health resorts are not travel agent commissionable, either, so this does not encourage travel agents to sell them.

Nevertheless, those spa resorts that have made efforts to attract a commercial clientele have seen a good return on their investments. These include Vichy and Vittel in France.

### **8.2.6 All season mountain resorts**

Despite the growth in winter sports' business during the last winter season — due both to the abundance of snow and to the last-minute decision by many Europeans to cancel plans for holidays further afield as a result of the Gulf war — Europe's mountain resorts have been losing money over the past several years. The previous three or four seasons had been marked by an acute shortage of snow, resulting in a fall in visitor arrivals and overnights.

A number of resorts have been prevented from going bankrupt only thanks to financial aid and support from their national governments. In order to survive, mountain resorts have increasingly started to develop a wide range of year-round attractions to extend their appeal. Although it is too early to quantify the impact on market demand, there are signs that tourism is starting to pick up in the summer and shoulder months.

## **8.3 Innovative Products**

### **8.3.1 Low income and disabled travellers**

ETB has piloted a scheme for two years to provide holidays at very low cost for families or others on low incomes utilising capacity at hotels, guest houses and visitor attractions during the off-peak period. The principle operated is that voluntary agencies identify groups of people unable to take holidays because of low income (typically disabled people, lone parent families and elderly people) in a particular town and coach transport is provided to take them to the holiday destination where the groups are deliberately mixed and integrated. The coach company, accommodation providers and visitor attractions offer their facilities at a considerably reduced sum for the holiday. The scheme has been immensely successful and will be developed in the future.

International Cooperation to assist the disabled traveller has been seen within the frame of the European Year of Tourism (EYT) 1991 and a special pan-European project on tourism for the disabled people was carried through by the STB in cooperation with the English, Finnish and Norwegian Tourist Boards. The project culminated with a "Tourism for All" Conference in Gatwick with some 200 participants from 18 different countries.

In Portugal, banks have gone as far as to offer higher salaries to staff willing to take their holidays in January and February. But it has proved very difficult to change people's travel habits overnight and even those people who are not obliged to take their main holidays during the peak July and August summer season tend to do so.

### **8.3.2 Innovative products for social tourism**

A number of successful Social Tourism programmes worth a mention have been incorporated in various countries in Europe, and have seen successful results.

*GREECE*

the NTOG and the "Workers Home" (for workers and employees of the private sector) have organised during 1989 and 1990, as they also did in the previous years, programmes of "Social Tourism" for persons of all ages who have a low income, below a certain limit set each year. The above persons can enjoy 7-day holidays half-board paying a nominal price, whereas the rest is subsidised by the NTOG or the "Workers Home". Beneficiaries of the programme have also reductions in transport and museum charges during their holidays.

Special low prices were offered within the framework of the programme of "Social Tourism" for holidays in Cyprus. For young people in particular, there were winter tourism programmes, spring tourism programme and summer tourism programmes organised by the NTOG and the General Secretariat of the Young Generation. The winter tourism programmes were of a duration of 5 days at Christmas or three days (Friday, Saturday and Sunday) and comprised half-board accommodation at low prices in ski resorts, mountain refuges and youth hostels, which was combined, depending on the location, with ski courses, mountaineering or speleology. There was also a spring programme for young people of the G.S.Y.G. (General Secretariat of Young Generation) which included a 5 day Easter holiday and 3 day weekends. The summer programmes of NTOG and G.S.Y.G. provided for 3.5 or 7 day holidays in the case of NTOG, and 7 day holidays, in the case of G.S.Y.G., in hotels or camping sites at low prices. Finally there is an exchange programme of the G.S.Y.G. with Cyprus, which concerns 2,500 young people between the ages of 18-25. The eligible young people get air transport, 6 days half-board accommodation and guided tours at a low price. The programme was applied between 25/11/90 and 14/12/90.

*SPAIN*

**Social Tourism** The Programmes offered by the Instituto Nacional de Servicios Sociales (National Institute of Social Services) stand out and are, in turn, related to the holidays for Senior Citizens and single parent holidays for mothers who are responsible for their children.

Various Autonomous Communities collaborate with both projects such as Andalusia, Marcia, the Balearic Islands, Catalonia and Valencia for programmes for Senior Citizens and Castilla-la Mancha, Extramadura, and Madrid in the case of Single Parent vacations together with Andalusia, Valencia and Castilla-Leon.

*Spanish Youth Tourism.*

This is carried out via the network TIVE, Oficina de Turismo Juvenile (Youth Tourism Office) where various tourist services, help and advice are offered (Travel, Studies, exchanges, etc.).

**SWEDEN**

A pilot programme with Governmental financial support, started in 1989 by the STB in co-operation with the Trade Union Federation, has continued through 1990-1991. The aim is to extend the possibilities for Trade Union members to experience suitable holiday recreation facilities.

**8.3.3 Euro-Villages**

A key organisation in the social tourism sector is Euro-Villages, a GEIE (Groupement Européen d'Intérêt Economique) comprising the following members: VVF — Villages Vacances Familles (France) and Loisirs et Vacances (Belgium), both founding members; ETSI (Italy), REKA (Switzerland), Relais Soleil (France), APORTAL (Portugal), IGS (Spain), Familienferienwerk (Germany).

The first Euro-Village, located in Cap d'Agde, is a Franco-Belgian venture which has now been operating for eight years. According to VVF, the influx of Belgians who account for 40% of the clientele has helped to ease seasonal imbalances. VVF, which was set up in 1959 and currently has a capacity of 186 villages in France with a total of 67,000 beds, says its main problem is that it cannot satisfy demand in the high season, yet it is only full four months of the year. One of the main attractions of developing villages across Europe was to be able to ease the seasonal imbalance of demand through the internationalisation of its clientele.

Two Euro Villages opened in March this year: one in Obernaix, Alsace (a joint venture between VVF, Deutsches Familienferienwerk and Loisirs et Vacances) and the other in Brussels (Loisirs et Vacances, VVF and Relais Soleil).

New developments are under construction or in planning for Ireland, Spain, Portugal, Italy, France and Belgium. There are also plans to develop a new type of holiday accommodation across Europe, Euro-Gîtes. But this depends on the willingness of individual European governments to provide start-up funding.

#### 8.3.4 Chèque-Vacances

The chèque-vacances was introduced in France in 1982 although the concept, based on the Swiss REKA voucher system, was first proposed in the early-1970s. Since state funding was at the time not forthcoming, it was launched thanks to a loan of FF 50 mn from the Caisse de Dépôts et Consignations.

Unlike the Swiss scheme, which is open to anyone, the French chèque-vacances is restricted to the underprivileged classes — currently to those households earning less than FF 12,000 a month (up from FF 9,830 in 1990).

In 1990, the Agence Nationale pour les Chèques-Vacances (ANCV), the organisation responsible for managing the scheme, made a profit for the first time. The chèque-vacances is now accepted by 30,000 establishments and companies, including 2,000 travel agents. More than 2.5 mn French people, or 720,000 families, benefited from the scheme last year and the numbers are growing fast.

The recipient's employer, or the company's works' council (comité d'entreprise) pays 20%-80% of the value of the voucher. Contributions are tax deductible. Until now, companies with fewer than 50 staff — which are not obliged to have a works' council — have not been able to benefit from the tax deductions, unless the company itself subsidises the vouchers. But this situation is expected to change in the coming year so that all workers can benefit.

The scheme's success is largely attributed to the fact that reimbursement to

suppliers is speedy and they only have to pay a 1% commission when they accept the vouchers. But it is also due to the fact that state organisations, which were slow in adopting the scheme, now account for over 50% of turnover.

With the strong support of the French government, the ANCV is now endeavouring to promote a Eurochèque-Vacances scheme through EC member countries — whereby vouchers issued in any of the twelve member states would be redeemable in the other eleven. The EC has reportedly agreed to finance a study to assess the potential of such a scheme.

Other holiday assistance schemes have been introduced around Europe. The Flanders government in Belgium, for example, facilitates holiday-taking by people with lower incomes. There is an increasing preference for schemes which help consumers directly — "aide à la personne" — as opposed to assistance with investment and development — "aide à la pierre".



**Table 102**  
**Use of the French Chèque-Vacances by sector of activity\*, 1987-91**

Sector	% market share				
	1987	1988	1989	1990	1991 Jan-Mar
<b>Accommodation</b>	<b>42.8</b>	<b>49.8</b>	<b>48.8</b>	<b>48.1</b>	<b>39.1</b>
- Social tourism establishments	24.9	21.6	20.8	19.4	
- Hotels	9.0	8.4	8.2	8.1	
- Camping/caravan sites	5.1	5.4	5.5	5.5	
- Rural "gîtes"	3.8	14.5	14.4	15.0	
<b>Restaurants/cafes</b>	<b>13.4</b>	<b>11.5</b>	<b>11.5</b>	<b>11.3</b>	<b>10.3</b>
<b>Transport</b>	<b>25.2</b>	<b>23.4</b>	<b>22.8</b>	<b>24.5</b>	<b>27.9</b>
- SNCF (Railways)	11.3	10.5	9.5	9.0	
- Motorway tolls	11.0	8.7	8.4	10.7	
- Airlines	1.5	1.3	1.3	1.2	
- Ski lifts/cable cars	0.7	0.7	0.8	0.8	
- Shipping	0.5	0.4	0.5	0.4	
- Coach transport	0.2	1.8	2.2	2.3	
<b>Entertainment, leisure and sporting activities</b>	<b>9.5</b>	<b>8.3</b>	<b>8.5</b>	<b>8.5</b>	<b>9.2</b>
<b>Travel agents/tour operators</b>	<b>9.1</b>	<b>7.0</b>	<b>8.4</b>	<b>7.6</b>	<b>13.5</b>
<b>Total value, FF mn</b>	<b>122</b>	<b>205</b>	<b>320</b>	<b>474</b>	<b>97</b>

**Source:** Agence Nationale pour les Chèques de Vacances (ANCV), France.

**Notes:** Includes only that share which is subsidised by employer, comités d'entreprise or social tourism organisation, not recipients' own contribution.

### **8.3.5 Coach travel**

As a result of the Gulf crisis, fears about potential terrorism threats in the air discouraged many people from travelling by plane in the first four months of 1991. The result was an immediate growth in the volume of coach travel and an increase in coach transportation capacity by tour operators and coach companies.

The revival of interest in the coach travel market also seems to have generated increased demand for this type of transportation — not just from the lower socio-economic levels of the population, either. A study conducted by Maison de la France, "Le Tourisme et le Transport par l'Autocar en Europe", has also identified an untapped demand for off-season coach travel.

Most importantly, 39% of demand for coach tourism, according to Maison de la France, comes from the 55 plus age sector and the prime months for coach travel are May and July, followed by October, September, March and April.

This seems to indicate that there is good potential for increasing off-season sales to help fill under-utilised capacity.

### **8.3.6 Short breaks**

In the last couple of years, there has been a dramatic growth of interest from the private sector in tapping the short break market — in response to market demand for this type of product. Not just tour operators, but also airlines and hotel groups have launched their own FIT programmes (for the independent traveller) both in France and abroad.

### **8.3.7 Rural tourism**

Increased promotions by national governments, not to mention increased

investments in rural tourism — the French government invested FF 65 bn in 1990, for example — have started to reap benefits. Rural tourism is beginning to show stronger growth than sun and beach tourism, both in the domestic and foreign markets.

But the investments have not gone far enough. Many local inns and "gîtes" are badly in need of repair and owners have difficulty in finding the financial resources to maintain the properties.

### **8.3.8 River/fluvial tourism**

Efforts to increase the season for river/fluvial tourism — notably in France — reportedly generated double digit growth from the European market in 1990.

### **8.3.9 Theme parks**

While the operating performance of many of the theme parks that have sprung up in Europe since the early-1980s has generally been below expectations - largely due to over-ambitious expectations for international clientele — theme parks have proved to be a very popular weekend activity for Europeans, whether tourists or excursionists.

The arrival of Euro Disney in France next year is expected to boost both domestic and international tourism to the region. The Magic Kingdom, the first phase of Euro Disneyland, will have six hotels, accounting for some 5,200 rooms. But by the time the park is fully completed in 2011, Euro-Disney will have developed over 18,000 rooms itself. Local developers, determined not to miss out on the new market opportunities, are also planning to build an additional 11,000 or so rooms by 1992/93.

**Table 103**  
**Visitor forecasts for Euro-Disneyland, 1992**

Market	% market share	
	of total arrivals	of total room-nights†
France	50	
France and southern Europe	...	20
Germany	14	20
U.K.	8	20
Netherlands/Scandinavia	4	20
Belgium	4	
Other Europe	10	20
Rest of world	10	

Source: Euro-Disneyland.

Notes: † Euro-Disneyland owned and managed hotels.

Disney maintains that the park will stimulate travel to Paris, particularly during weekends when a large share of the city's hotels suffer sharp troughs. It is interesting to note that in contrast with Paris hotels which discount rates at the weekends, Disney's hotel rates will be higher at the weekends than during the weekdays. Prices will also vary according to season of the year and rates are expected to be much lower in the off-peak periods — notably during the French school terms.

Disney also expects a much higher share of bookings through the travel agents than for Disney parks in the USA. But direct reservations will also be possible for consumers through national videotext systems.

In the first year of operations, France is expected to generate around 50% of ticket sales. Germany should be number two but interestingly, the U.K. is

seen as a more important market than neighbouring Belgium, Luxembourg and the Netherlands. U.K. tour operators, notably Lunn Poly, are already selling package programmes to the theme park.

In terms of room-night sales, Europe is expected to account for between 80-90% of sales. But the share could reduce as early as 1993.

### 8.3.10 The "club holiday" concept

The "club holiday" concept is increasingly attracting interest from the European market, as reflected by the growth in supply of this type of product. Although Club Méditerranée's programmes are beyond the financial reach of a significant share of Europe's leisure travellers, a number of alternative brand names are available, such as Robinson Club in Germany, Club Aquarius in France, Center Parcs across Europe and — for the lower income groups — Butlin's, Warner's and similar products in the U.K. and other markets.

All-weather centres are particularly suitable as their facilities can be promoted and marketed year round. Seasonal pricing also enables many people who could not afford to take a holiday in the peak season to choose a less expensive time of year to travel.

**Club Med** is worth a special mention, however, because of its efforts to diversify its products over the last few years, both to attract a wider market and to respond to changing market demand.

Club Med currently has around 105 holiday villages with a capacity of close to 68,000 beds in 34 countries around the world. This does not include the 16 villages of Valtur, its 23 per cent owned Italian subsidiary, its City Club in Vienna and the Maeva Clubhotels — bringing the total of villages to 237.

Europe accounts for 55 villages and 37,460 beds and in its FY 1989/90 (ended October 31, 1990), sales in Europe generated some 62% of Club Med's "gentils membres", or 761,500 clients.

**Table 104**  
**Club Med's capacity in Europe**

Country	No. of villages*	No of beds*
<b>EC Europe</b>	<b>35</b>	<b>25,453</b>
France	17	8,414
Italy	7	7,883
Greece	6	5,094
Spain	5	4,241
Portugal	1	751
Ireland	1	172
<b>Other Europe</b>	<b>18</b>	<b>10,905</b>
Switzerland	10	4,661
Turkey	5	4,164
Yugoslavia	2	2,080
Bulgaria	1	930
<b>Total</b>	<b>55</b>	<b>37,460</b>

Notes: \* As at October 1, 1991.

Source: Club Med

In the past twelve months, three new resorts have opened in Europe: the "snow" village of La Plagne in France, a sun & beach resort in Ibiza, and a village in Waterville, Ireland. New projects are under development, or in planning, for France, Spain, Italy and different parts of Eastern Europe.

In early October 1991, Club Med signed a joint venture agreement with LTU, Germany's leading charter carrier and third biggest tour operator group, to develop a new brand of German language holiday villages specifically for Germany and German speaking markets. The first of the new Club Med style villages, which will be developed primarily in traditional Mediterranean and Caribbean holiday destinations, are scheduled to open by summer 1993. By 1995, around ten villages should be operational.

**Table 105**  
**Club Med's sales in Europe**

Market	No. of sales
France	431,700
Italy	88,500
Germany	80,400
Belgium	57,700
Switzerland	38,400
U.K.	24,200
Austria	11,900
Netherlands	8,500
Turkey	8,200
Spain	4,900
Others	7,100
Total	761,500

Source: Club Med

In Europe and the Mediterranean region, villages tend to come under the general heading of summer or winter resorts. The majority of its winter resorts — offering a variety of winter sports' activities, and primarily skiing — are open from just before Christmas to the following Easter (hence the objections this year from Club Med to the changes in the school calendar, since the French spring school holidays came some time after Easter and therefore too late for its winter sports' resorts). The exclusively "summer" resorts are open from around Ascension through to the month of October.

Club Med's policy over the past five to ten years seems to have been increasingly to lengthen the opening period of its holiday villages by turning them into all-season resorts and by attracting a more diversified clientele.

Approximately one quarter of Club Med's villages in the region stay open year round. In the case of virtually all these villages, year-round opening is

feasible because they have been designed specifically to attract a wide range of market sectors which tend to be less seasonal.

Year-round villages include: Marbella in Spain (a grand hotel, attracting conferences, seminars and golf enthusiasts), Portugal (also golf and favoured by an older clientele), Grasse in the south of France (conferences), Pompadour in the French Limousin (a very wide range of year-round sporting activities, including organised tournaments), Agadir and Marrakesh in Morocco (good weather year round).

The development of conference and seminar business has been one of Club Med's major goals since the mid-1980s. The emphasis is both on developing specially tailored resorts — which are designed with built-in conference facilities — and also adapting existing resorts to cater for the market. More and more Club Med villages now feature telephones in guestrooms — which was totally taboo in the past — and guests are not obliged to use communal dining facilities as there are smaller restaurants with facilities for private groups. It is also increasingly trying to attract incentives.

Another attraction off-season are the numerous tournaments organised by Club Med, either for sporting activities such as golf, horse-riding and tennis, or for bridge.

Some villages have become micro-computer centres, too, offering courses throughout the year for companies and individuals, but primarily in the shoulder and off-peak seasons.

Club Med has adopted two basic strategies to attract business in the off-season months: seasonal pricing and special promotions.

Summer resorts are priced much lower in the shoulder months of June and September, for example, than in the peak months of July and August. But in addition, there are special promotions to encourage people with children under school age to book for these months, including free holidays for children up to the age of six, free babysitting at its specially tailored Baby- and Mini-Clubs, etc. For the winter sports' resorts, the same policy is applied.



Club Med also organises special theme weeks off-season, such as bridge and golfing weeks, when people can improve skills or simply explore new activities. These have been particularly successful in attracting third generation clients who are not tied to school and traditional work holiday periods.

Although the development of Club Med's City Clubs seems to have been postponed — it only has one in Vienna, although another is planned for Prague — the group has increasingly relaxed its rules regarding length of stay in its holiday villages to attract more weekend and short break visitors. The minimum one week rule is usually only applied in high season.

#### **8.4 New products to stimulate demand**

It is in the opinion of the Government/national tourism representatives whom we have interviewed during the course of this research that the EC should in general not be involved in funding new products. Exceptions may be the free loans for Euro-Villages and similar accommodation products for lower socio-economic levels.

EC/national government aid could instead be proposed for special train travel packages to boost rail travel and thereby ease air congestion and also regional (3rd level) airport development might be helped by EC funding to attain the same objectives i.e. to take away traffic from the main airports.

However, In order to facilitate travel for people who either do not have the sufficient financial means to go on holiday, or who are unable to travel for a variety of reasons a certain number of products could be implemented by the industry. The following are some suggestions:

#### **8.4.1 Rail and air travel discounts**

While there are a number of special fares for discounted travel, they are often difficult to take advantage of because of the many conditions attached to them. Transporters could be encouraged to introduce more seasonal pricing and special short break package programmes based on mid-week as well as weekend departures.

After 1996, by which date it is currently proposed to free up fifth freedom traffic rights within the EC, we are likely to see a big increase in air transport capacity within Europe. Assuming the infrastructure can cope with the additional capacity — and regional airports will help to ease the load on major hubs — this will mean increased competition in pricing, which will in turn lead to lower fares and greater incentives for the travelling public.

#### **8.4.2 Holidays for schoolchildren**

The introduction of a compulsory week's holiday for all school classes in another EC member country — after the style of the French/Swiss "classes blanches or vertes" systems — would be beneficial on several counts.

Firstly, it would encourage young people to learn more about other countries in Europe and improve their language skills. In addition, it would ensure that those children whose families cannot afford to go away on holiday do not miss out themselves. It might even permit their parents to take a break while the children are away during an off-season period.

#### **8.4.3 Selling travel through videotext systems**

Technological advances will have a big impact on travel and tourism in the 1990s. Direct consumer access to computer reservations' systems and the ability to study all the options available at one's leisure will generate increased interest in travel. And the highly sophisticated global distributions' systems will allow for more flexible fare pricing and, probably, more bargains for the consumer.

A number of national destination data bases are also under development — Bravo in the U.K., Gulliver in Ireland and Swissline in Switzerland — to market all the small enterprises that are not listed on the bigger CRS systems. Some 80% of all registered accommodation in Europe are small, family owned business. But one of the major difficulties in standardising these systems will be to educate the small suppliers to deliver their information into the system and keep it updated.

The French experience has shown that the lower socio-economic sectors are just as likely to have a videotext system in their homes as the more affluent sectors of the population. So the development of Europe-wide destination data systems could stimulate travel by the underprivileged, especially if there are bargains available.

#### **8.4.4 Products to respond to the evolution**

The need is growing for new types of products to respond to the changing demand for a more active holiday. It has been stated in the study that most travellers of the future will no longer be satisfied in the traditional "lying on the beach" type of holiday package. Throughout this report suggestions have been made as to the types of products that must be implemented in the future. Here follows a further look at these forms of tourism for which the demand is rising.

With regard to outdoor new sports, nature and health tourism, the continuing primary role of sun and beach holidays in Europe (between 35 and 40 per cent) is confirmed by our analysis. However 15 per cent of European holidays relate to recreation in the uplands and winter sports, whilst country-side recreation (10 per cent), and sport holidays (9 per cent) are now of substantial significance.

An encouragement to selective development of active, sports-tourism holidays, can satisfy market segment needs via such things as- sports hotels with coaching and linked sports activities; sensitized, small group, upland trekking, and cross country skiing; organised nautical tourism offers, linked to systems of provisions in marinas/harbours, and anchorages; island and

inland eco-tourism based on community - provisions and linked to a variety of rural offers, based on nature/sports/country life.

Also, in the light of the changing European economic situation of the rural economy, rural tourism will play a growing role in the multi-strand economy of rural areas, and will therefore confirm the important social and economic role of rural tourism.

Urban tourism and cultural tourism is also growing at a fast pace. Innovations are evident across Europe, where many urban communities are now entrants into the tourism field, wanting economic and social gains from it. The expansion of urban-tourism relates not only to capital cities and to seaside-resorts (or maritime stations), but also to historic towns, country-towns, and industrial towns. Here interpretation and presentation should be done with care, and products should be carefully assembled with all the necessary components at appropriate scales, and with adequate understanding of the built environment.

The continuing traditional roles of **museums**, i.e. conservation, education, research, study, now have added new roles in tourism and leisure. This relates to an European heritage of extraordinary strength and richness, but must be paid for in terms of maintenance as well as its capital costs. The growing inter-dependence of tourism, heritage conservation plus interpretation/presentation, both in museums and in the wider environment, is important and must be given greater attention and more means.

The growing use of animation of traditional and new events related to the **arts and built heritage, traditions, sports and event re-enactments**, in which the European offer is rich are worthwhile to be considered when adapting new products for the tourism market.

Experience from a national perspective through heritage conservation, presentation and re-enactments show the rich range and vocabulary available for selective future action.

New products in the sphere of **business and conference tourism**, major

**theme-parks**, plus relating retailing to tourism, are important subjects which will require new attention in the EEC countries. It will be necessary to favour complementary forms of tourism, as for example art tourism during the weekends, in cities characterised by business tourism.

In considering the new products and their adaptation by the EEC countries it is first necessary to look at the constraints which the industry holds and how these new products will be effected by them, or, furthermore, if they will help to alleviate such problems. Many were mentioned throughout the study and when the suitability of supply was examined.

In general we can say that in many European countries it is now time to put in place policies that tend to diversify the school calendar and/or the industrial production calendar. This may take a long debate between the various governments, workers unions and the industrialists. However a fundamental rule remains; it is necessary to accept the seasonality of certain types of tourism and organise ways to manage it by individualizing new concept of mobility and adapting the labour force to a different tourist product.

In conclusion, the last couple of years have seen dramatic growth in the short break trips and consequentially a growth in demand for this type of product. With the increasing restrictions of seasonality we can expect to see even more short break popularity in the remainder of the 1990s. Short weekend packages all in the scope of active tourism could be adopted in the many sectors of the market that are already in need of modifications, such as all season mountain resorts, and could also have the aim of reducing seasonality.

## 9. Aid and Incentives for the industry

### 9.1 Examples of aid and incentives programmes

#### GREECE

A number of incentives are aimed at the country's economic and regional development in Law 1262 of 1983. The incentives are granted for the creation of productive investments and vary according to defined regions of the country. Tourism is considered "productive investment" under this law and covers the construction, extension and modernisation of hotels (up to 300 beds) and auxiliary facilities, winter sports facilities, spas, tourist apartments, and the cost of repair, renovation or conversion of traditional houses into hotels or hotels.

#### Financial Incentives

##### **Grants:**

Grants are available in the form of capital assistance by the state as follows:

- for investments up to 800 million drachmas, the grant is given without encumbrance to cover part of the investment cost;
- for investments from 800 to 1,000 million drachmas: for the amount exceeding 800 million drachmas, 50 per cent of the grant is given without encumbrance to cover part of the investment cost and 50 per cent in the form of state participation in the capital of the company, which must either be a limited liability or public limited company;
- for investments over 1,000 million drachmas and for the amount exceeding 1,000 million drachmas the grant is entirely in the form of public participation in the company capital.

For investments in hotels over 300 beds, the grant is limited to that part of the investment relating to a capacity of 300 beds.

The exact size of the grant is determined on the basis of socio-economic and private economic regional development criteria, such as export prospects,

substitution of imports, energy saving, use of domestic raw materials and technology, market conditions of the specific industrial branch productivity, new employment opportunities, prevention of environment pollution and a project's viability.

**Preferential Grants:**

Certain investments of particular interest to the Greek economy are categorised as "special investments" and receive preferential forms of grants. Included in this category are certain tourism related projects: houses or buildings characterised as preservable or traditional and converted into hostels or hotel facilities, or workshops engaged in the production of traditional handicraft products or handworks.

**Interest Rate Subsidies:**

Subsidies are also available for certain investments qualifying for grants. The rate of subsidy is equal to the rate of grant approved and the normal duration of the subsidy is the first three years of servicing the loans contracted, although this increases for projects in certain areas of the country.

Interest rate subsidies are not granted where the investment qualifies for the benefit of untaxable allowances.

**Loans:**

Quasi financial assistance is available through the government's involvement in setting guidelines for the commercial banks to follow when making loans to hotel and tourist enterprises. While the financing is up to the discretion of the banks after approbation of the National Tourist Organisation for the land and the architectural plans, guidelines are set as to:

- the amount of loan financing, which cannot exceed 75 per cent of the pre-estimated cost although the value of the land is not included. In the event of a special government subsidy, the loan and subsidy combined

- should not exceed 90 per cent of the construction cost;
- the period of the loan: 20 years for certain tourist regions;
  - repayment terms: which should start 1 year after the unit commences operation and not later than 4 years after the date of conclusion of the loan contract;
  - the interest rate on loans for fixed assets is the rate applicable on productive investments in industry.

Other loans are available from banks and other credit institutions, at their own responsibility and discretion, for the completion of tourist units and the improvement and modernisation of hotel enterprise facilities.

Development laws govern the percentage of loan granted, taking into consideration the extent of the borrower's participation, the extent of subsidy, the locality of the project, nature of the investor and the viability of the unit.

### **Fiscal Incentives**

Incentives of this type comprise tax allowances and extra depreciation and apply to businesses in certain areas of the country provided they realise new investments.

#### **Tax Allowances:**

Tax allowances are applied to the profits of the year in which the investment was made and appear in the form of tax free reserves in separate accounts in the books of the company. Tax allowances vary from 40 to 70 per cent depending on region of the country.

Investments having received a grant or subsidy may not qualify for the benefit of tax allowances.

#### **Extra Depreciation:**

Hotel enterprises and camping sites are entitled to raise ordinary depreciation rates for fixed assets of between 20 and 50 per cent depending



on the area of the country. In calculating regular and extra depreciation, any state grants are deducted from the acquisition value of fixed assets.

## **SPAIN**

### **Financial Incentives:**

Preferential loans are available at approximately 5 per cent below commercial interest rates provided through the Credito Hotelero, administered by Banco Hipotecario de Espana.

### **Loans:**

Projects declared of "national touristic interest" by the Secretary General of tourism are eligible for loans up to a maximum amount of 60 per cent for the construction, development and modernisation of hotels. In addition, loans of up to 50 per cent are available for related tourism establishments and infrastructure and 40 per cent for machinery, fixtures and fittings and other equipment.

The maximum period of credit is 12 years, with three years at the commencement of the term for payment of interest only, although in reality the period is usually reduced to two years and the remaining period for amortisation on the credit. Projects declared of "national touristic interest" may exceptionally obtain credits of 14 years term.

The detail and administration of credits for tourism development is the responsibility of the banco Hipotecario de Espana. Current conditions are an interest rate of 13 per cent if the amount is more than 30 million pesetas, or 12.5 per cent if below that figure. In addition there is a commission of 0.4 per cent payable, and a three year repayment moratorium is available.

### **Grants:**

Grants are available provided the development company has invested at least one third of the total investment in the project. Grant aid can be up to

a maximum of 20 per cent of the total investment within stipulated stages of the project although in certain preferential development zones, grant aid can be up to 25 per cent of total investment.

### **Fiscal Incentives:**

Companies qualifying for assistance for certain projects under the law covering Zones of National Tourist Interest can benefit from reductions of up to 95 per cent on customs duties for imports considered essential for a tourist development.

### **SWEDEN**

The policy of granting loans and subsidies to tourist projects by public means has been continued after 1989, the overall purpose being to uphold employment, in less populated areas. For certain regions, e.g. the Island of Gotland, development programmes have been elaborated with direct governmental support and supervision.

### **SWITZERLAND**

Encouraging disadvantaged regions, especially mountain regions, through investment aid. In 1989 and 1990, projects worth some SF 55 million were supported under mountain region development programmes. The tourism infrastructures concerned were sports facilities, SF 16 million; swimming pools, SF 1 million; cable cars, ski lifts, SF 34 million; museums, SF 3 million; conference centres, SF 1 million. Financial assistance takes the form of long-term interest-free loans from the Confederation, generally matched by equivalent contributions from the Cantons.

### **PORTUGAL**

Legislation in Portugal is currently being reviewed in this sector. There are currently two main types of incentive available through the Fundo de Turismo (Tourism Fund): direct loans and subsidised interest rates. The other types of incentive are of a fiscal nature.

In nominating projects for assistance, they are firstly graded under "tourism utility" and "tourism importance" schemes:

A tourism utility concept is used to indicate that certain standards of construction and service are provided. Tourism utility status is granted by Directorate General of Tourism and the criteria used in awarding it to a particular project are:

- location, type of development, standard of facilities, value in relation to existing tourism infrastructure, contribution to regional development;
- financial status of the operator;
- compatibility with official policy for that sector.

A tourism importance status is also applied to projects according to the region, type and classification of the investment.

### **Financial Incentives**

#### **Direct Loans:**

Loans are granted by the Fondo de Turismo to projects with tourism utility or tourism importance status with the exception of cafes, pubs, tea houses, bars and nightclubs. They may also be granted to tourist accommodation in private houses, rural tourism projects, tourism promotions abroad, tourist guides and other tourism promotional literature.

In the majority of cases, the amount of the loan may not exceed 60 per cent of the total investment cost up to a maximum of 100 million escudos.

Special restrictions apply to camping sites (the loan amount must be under 50 million escudos), promotional activities, printing and publications (the loan cannot exceed 50 per cent of the total cost). Hotels and travel agents can only benefit by an amount of less than 3 per cent of sales.

Lending terms are favourable, with interest rates lower than those available through commercial institutions. In addition, they may be reduced during the first year or, in certain cases, the first year's interest may be capitalised.

The duration of loans varies from 5 to a maximum of 15 years, depending on the type of project. A moratorium on repayments is offered for up to the first 5 years, also depending on the type of project.

### **Interest Rate Subsidies:**

Subsidies are available under the System of Incentives to Tourism Investment scheme. Loans are granted by the commercial banks to investors in tourism. The interest rate is negotiated with the bank by the investor, according to the market rate, and subsidised by the Fundo de Turismo.

Projects are assessed individually in accordance with a number of cost-benefit criteria in order to award them a points rating. The cost benefit criteria include an assessment of the project's use of solar energy, its imported investment recovery rate, the use of local resources and the architectural quality.

This points rating plus the Bank of Portugal base rate are the variables used to determine the subsidy on interest rates. This subsidy will decrease as the loan period elapses. The duration is for a maximum of 3, 5 or 7 years according to the type of project. In addition, the subsidy will cease 2 years before the end of the loan period.

These subsidies are paid by the Fundo de Turismo on amounts not exceeding 66.6 per cent of the investment in fixed assets, and may only be granted once 25 per cent of the total bank loan has been taken up. Where a project has also been granted other benefits, a developer may elect to take advantage of an interest capitalisation scheme instead of a interest rate subsidy, where such a scheme can prove to be more beneficial.

### **Fiscal Incentives**

These are applied to those projects regarded as of "tourist utility" and may be granted simultaneously with financial benefits. Benefits will also depend

on the amount of the investor's own capital and the rate of return on capital invested in the project.

**Tax Exemption:**

Exemption from real estate and industrial levies for up to 7 years from the date of opening.

Exemptions from property transfer tax, capital transfer tax and from stamp duty on the purchase of buildings. Exemption is also granted from these taxes on increases in capital made by transferring funds to reserve or by bond issues.

**Depreciation Allowances:**

Halving of the period over which capital may be depreciated.

**Other Forms of Assistance**

**Customs Duties:**

Equipment required for hotel and tourism projects that is not available in Portugal is free of customs duties.

**Rental Subsidies:**

The Fundo de Turismo has agreements with certain equipment leasing companies to subsidise rentals paid by tourism related companies.

**Cultural Promotion:**

Grants are also available for certain events promoting cultural and artistic activities.

## **UNITED KINGDOM**

### **Financial Incentives**

In the United Kingdom, financial assistance is available from two sources: those bodies dealing directly in the tourism sector (principal sources) and from other public bodies whose interests also have a tourism dimension (secondary sources).

### **Principal Sources**

#### **Tourist Boards**

The principal sources of financial assistance for tourism related developments in the United Kingdom are the four national tourist boards for Scotland, England, Wales and Northern Ireland.

The four national tourist boards were established by Act of Parliament, are financed by central government and each is provided with an annual budget with which they can directly assist the financing of new tourism development.

The boards may make their funds available as follows:

- capital grant;
- loan;
- interest relief grant;
- any combination of the above.

At present, the boards favour the use of the capital grant option.

Grant assistance is available at the Board's discretion for the provision or upgrading of hotels, self-catering, guest house and caravan park accommodation, the creation of attractions, museums, and certain catering outlets and the provision of interpretative facilities for tourists.

Grant assistance is available only in relation to capital expenditure for the creation of tangible assets, whilst costs associated with maintenance, operational expenditure and working capital are not eligible.

Grant assistance from public sources is technically available for up to 50 per cent of a project's capital costs but in practice this is usually in a range from 10 to 15 per cent of eligible costs. The English Tourist Board, however, operates a "streamlined aid" scheme for smaller projects with capital costs of up to £ 100,000 and grant assistance here may be available up to 20 per cent.

The Regional Tourist Boards within the national Tourist Board structure, as well as the British Tourist Authority, can also assist with limited financial help towards joint marketing and promotion schemes which will attract visitors from outside the particular region in the UK and from overseas.

### Secondary Sources

A number of other public bodies operate grant or loan assistance schemes for development purposes within their particular areas of interest. Where these interests can be shown to have a meaningful tourism dimension, then tourist developments may also benefit. Thus the following bodies can in certain circumstances support tourism developments:

- The Arts Council;
- The Council for Small Industries in Rural Areas;
- The Countryside Commission;
- The Civic Trust;
- The British Waterways Board;
- The Forestry Commission;
- The Historic Buildings Council;
- The Sports Council.

### **Urban Development Grants**

The primary aim of this scheme is to promote the economic and physical regeneration of inner urban areas by encouraging private sector investment into such areas. There are no formal restrictions on the type or size of project for which an Urban Development Grant may be sought and hence hotels, museums and tourist attractions could be considered on equal terms with factories and other activities. The deciding factor will be the project's ability to counteract urban decay, or to regenerate areas where decay has already occurred. However the private sector contribution to a project is expected to be significant (at least 80 per cent) in relation to total project costs. The public sector contribution (the Urban Development Grant) should be the minimum necessary to allow the project to go ahead, and the project should make a demonstrable contribution to meet the social needs of inner urban areas (e.g. employment creation), and create a climate of confidence for the private sector.

### **Fiscal Incentives**

The only fiscal incentives available for tourism related developments are those associated with projects which will be built in one of the government established enterprise zones. Such incentives are not only available to tourist developments but to any type of enterprise setting up in one of these zones.

The fiscal incentives are:

- exemption from development land tax;
- 100 per cent allowances for corporation and income tax purposes for capital expenditure on industrial and commercial buildings;
- exemption from local authority property taxes for the life of the enterprise zone (maximum of 10 years).



### **Other Forms of Assistance**

Enterprise zone locations offer further non-fiscal incentives including:

- relaxed planning permission requirements;
- exemption from industrial training levies;
- relaxation of customs and other control procedures;
- reduced government requests for statistical information.

## **9.2 Direct Community involvement**

Areas in which the EC has an important role to play:

- Coordination on the staggering of school holidays within Europe.
- Implementation of Europe-wide schemes, such as youth travel passes, Eurochèque Vacances.
- Coordination of data destination bases so that the products and services of each country may be marketed and promoted through computer reservation systems to the travel trade and consumers in other countries as well as in its own national market.

## **9.3 Implementation of a Specific Aid Programme**

For the scope of the present report the Consultants believe that the information given is sufficient for the requirements of this assignment as the data were intended to make it possible to assess the opportuneness of implementing specific forms of aid. Beyond this, the section on aid cannot go.

In general the present section represents an introduction to a further work phase where a complete EEC model on aid to tourism and the tourism industry will be provided.

As a start, under the "Action Plan for Tourism" programme envisaged by the Tourism Unit, DG XXIII, a study will be realized during 1992 on the "WAYS OF ENCOURAGING HOLIDAY TRAVEL".

The objectives of the study, on the basis of a survey of the various forms of aid available in the Member States, are to outline the prospects for developing certain formulae at a European level.

The aid in question refers to all forms of direct or indirect assistance helping disadvantaged groups to go away on holiday.

The programme of the study, on the basis of inquiries of Government bodies in the Member States and bodies specializing in Tourism, consumer organisations and agencies involved in this field, requires that the consultants undertake to draw up a list of all forms of aid available in the Community to help disadvantaged persons travel on holiday (grants for facilities-personal grants), devoting a special chapter to assistance for young people, to make a comparative analysis of their cost-effectiveness, set out ways at which they could be extended to a European level and finally to make a detailed examination of the role of agencies specializing in "Social Tourism" and possibly of other organisations or institutions in such a case.

In addition they must put forward the necessary recommendations and suggestions with view to the possible introduction of this European payment system.

Some of the work made in the present research will hopefully be of use to this or a further work phase on the subject and make it possible to assess the opportuneness of an aid programme.

#### **9.4 Recommendations**

It may not be practicable for the European Commission to become directly involved in providing incentives to the private sector. What is perhaps needed is a promotional body, rather like the European Travel Commission or Maison de la France, which could work closely with the EC as an

umbrella organisation serving the interests of both the public and private sector in Europe.

This body could also be made responsible for identifying areas of research needed by the industry.

It would also be an appropriate body to conduct publicity campaigns on the EC's behalf and the EC could provide subsidies to this body to this effect. The non-EC Members of ETC would have to make a proportional financial contribution to these campaigns. Like the ETC, this body could carry out public relations, press work and commercial activities with the travel trade and would be able to identify key areas for further market research, marketing and promotions.

In terms of State aid, the EC cannot and should not act on behalf of Member States in the area of intra-European travel and tourism promotion, where States are in direct competition with each other.

But it can play an important role in guiding individual States as to where they should provide funds for lesser developed and poorer regions and for the upgrading and modernisation of the tourism plant in less visited tourist regions.

It can also encourage the creation of quality standards at national level.

Some examples of Incentives and aid on a national level have been instituted at various levels in various countries within Europe for superstructures and for the individual. If the Commission were to become involved in the implementation of specific aid programmes the following could be used as examples for the framework.

Other suggestions include that the EC declare as a priority a policy to nurture and control tourism consistent with the size of the industry within the Community.

It could provide technical and financial assistance to member countries for development of substantial tourism.

Formulated technical framework for planned cost benefit analysis central tourism secretariat/consultancy (with the private sector) to administer.

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# Eastern Europe and the USSR

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## THE CHALLENGE OF FREEDOM

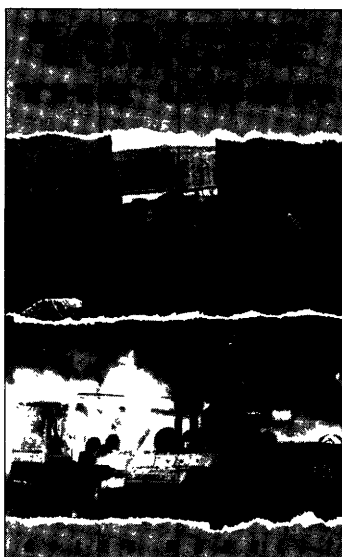
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GILES MERRITT

The sparks of unrest that leapt from Berlin in November 1989 to Moscow's Red Square in August 1991 are firing an explosion of political and economic change. Out of the ashes of Communism is emerging the shape of a vast new European market-place stretching from the Atlantic to the Pacific.

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Written with the cooperation and support of the European Commission, this book sets out to identify the key policy areas where a new partnership is being forged between the countries of Eastern and Western Europe. It offers a privileged insight into the current thinking of European



Community officials, politicians and industrial leaders, and analyses the factors that will determine whether the emerging market economies of Eastern Europe can truly be absorbed into a single European economy.

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For anyone concerned about the future of Eastern Europe and the USSR, whether from a political, social or economic standpoint, this book is essential reading.

# Bulletin of the European Communities

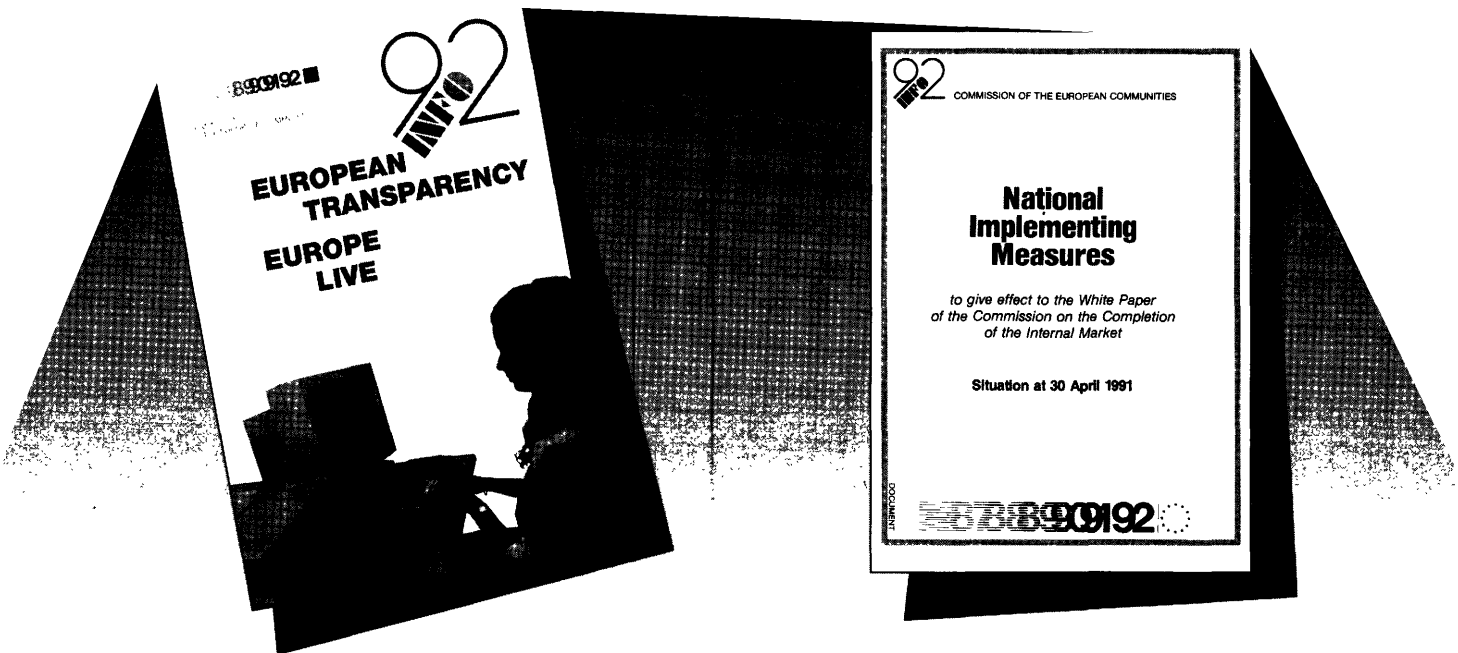
The *Bulletin of the European Communities*, which is issued 10 times a year (monthly, except for the January/February and July/August double issues), is an official reference publication covering all spheres of Community activity.

It is compact, easy to consult (with an index and copious references to the Official Journal and to previous issues), logically structured (to reflect the main fields of Community policy) and wholly reliable. The Bulletin is an essential reference tool, describing the passage of Community legislation through all its stages from presentation of a proposal by the Commission to final enactment by the Council.

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To make Community legislation more accessible to the public, the Commission of the European Communities publishes a Directory, updated twice a year, covering:

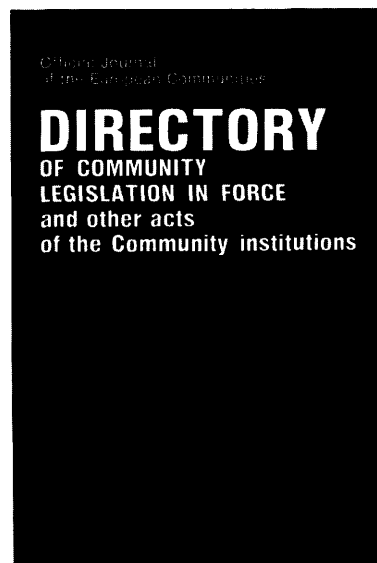
- binding instruments of secondary legislation arising out of the Treaties establishing the three Communities (regulations, decisions, directives, etc.);
- other legislation (internal agreements, etc.);
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Each entry in the Directory gives the number and title of the instrument, together with a reference to the Official Journal in which it is to be found. Any amending instruments are also indicated, with the appropriate references in each case.

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# EUROPEAN ECONOMY

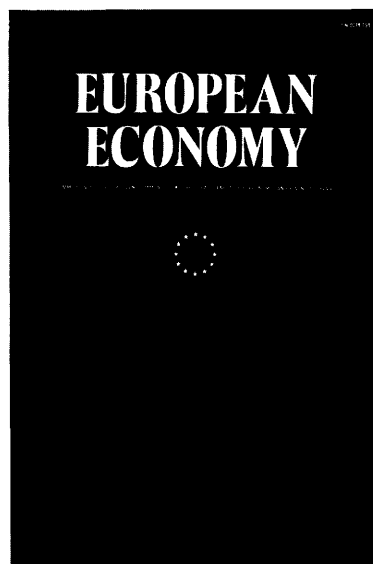
*European Economy* appears four times a year, in March, May, July and November. It contains important reports and communications from the Commission to the Council and to Parliament on the economic situation and developments, as well as on the borrowing and lending activities of the Community. In addition, *European Economy* presents reports and studies on problems concerning economic policy.

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Unless otherwise indicated, the texts are published under the responsibility of the Directorate-General for Economic and Financial Affairs of the Commission of the European Communities, 200 rue de la Loi, B-1049 Brussels, to which enquiries other than those related to sales and subscriptions should be addressed.

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# Success in business

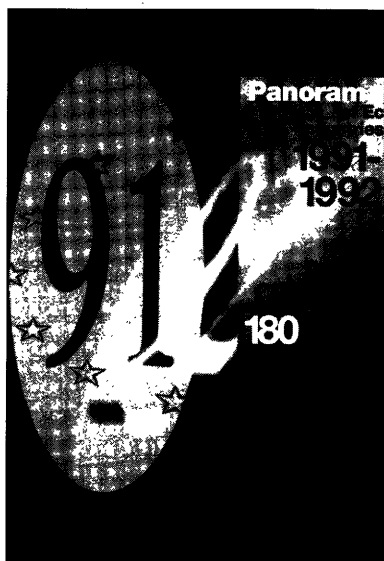
**depends on the decisions you make ...  
which depend on the information you receive**

Make sure that your decisions are based on information that is accurate and complete!

In a period of rapid adjustment, with national economies merging into a single European economy under the impetus of 1992, reliable information on the performance of specialized industry sectors is essential to suppliers, customers, bankers and policymakers.

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# ENERGY

## A CHALLENGE FOR EUROPE AND THE WORLD

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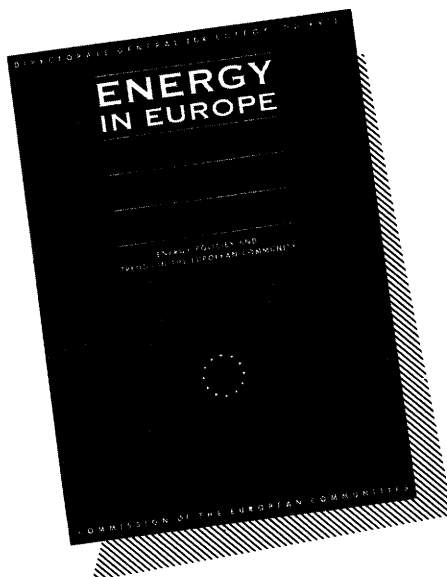
Since it first appeared in 1985 **Energy in Europe** has become recognized as an invaluable source of information on both the policy-making and the operational aspects of European Community energy policy. Subscribers include leaders of energy-consuming and energy-producing industries and other decision-makers in the private and public sectors, as well as major consultancies and research institutes in and outside the Community.

In the present situation within the Community, itself at the eve of the single market, and *vis-à-vis* the huge energy problems, as well as the potential, of our neighbours in Central and Eastern Europe and in the Commonwealth of Independent States, the energy sector is of the greatest strategic importance. An understanding of it is indispensable in many areas of economic activity. It also constitutes a crucial factor within a debate of truly global importance, namely the protection of the environment, including the global warming issue.

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