COMMISSION OF THE EUROPEAN COMMUNITIES
DIRECTORATE-GENERAL XXIII — TOURISM UNIT

STUDIES

ALL-SEASON TOURISM: ANALYSIS OF EXPERIENCE, SUITABLE PRODUCTS AND CLIENTELE

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Commission of the European Communities
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1993

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EXECUTIVE SUMMARY

Introduction

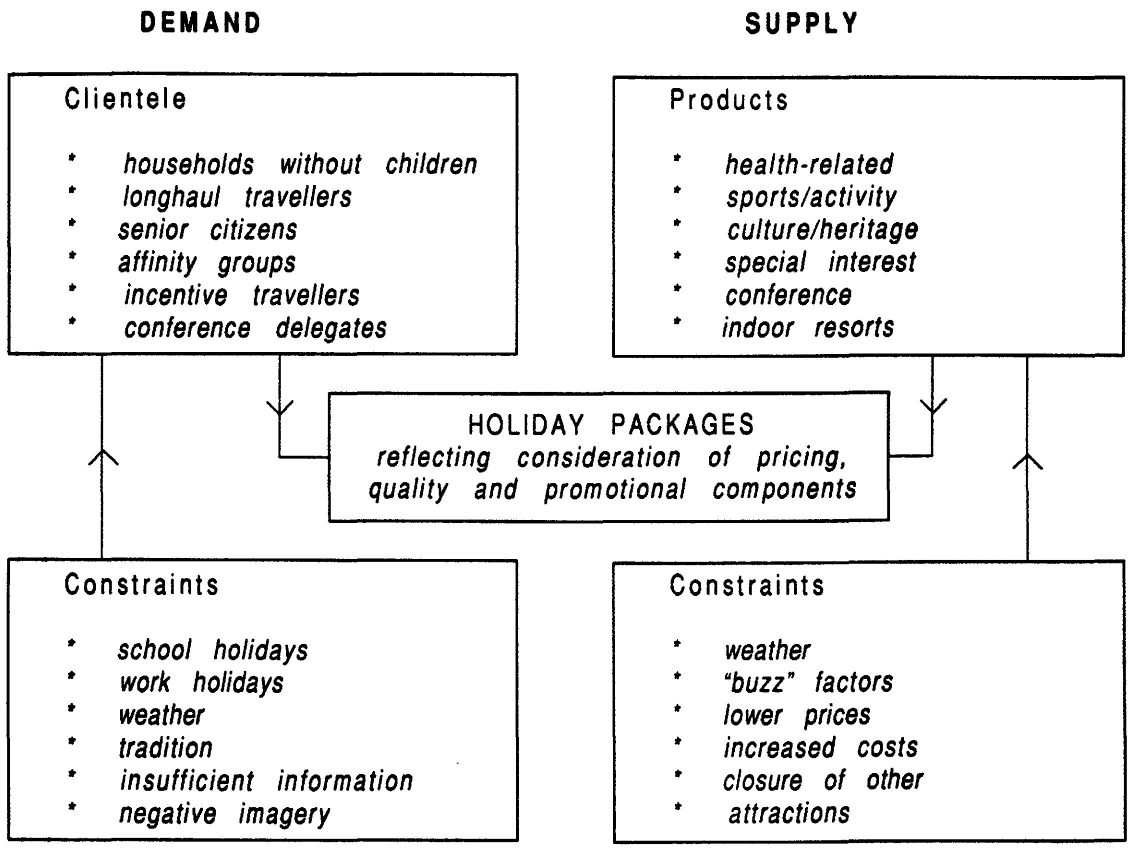
1 The existence of seasonal peaks in demand for, and provision of, tourism services in the European Community and elsewhere is well documented. The timing of these peaks can differ - peaks may occur on a daily or weekly basis or, as mainly discussed in this report, at different times of the year. The report examines: firstly, the factors that contribute to the seasonality of tourism arrivals; secondly, the problems which this creates; and, thirdly, the strategies which can be followed to either spread tourism to other parts of the year or ameliorate the problems seasonality causes. The report concentrates on the third topic, ie anti-seasonality strategies.

Demand Issues

2 The success of a wide variety of European tourist firms, organisations and resorts confirms that there is considerable scope for attracting visitors in the off-season. The clientele most able and most likely to travel in the off-season are well recognised by the industry in general. They include senior citizens, conference delegates, incentive travellers, Japanese students and honeymooners, "empty nesters", affinity groups and special interest tourists. Figure 1 lists some of the main clientele groups. All of these market segments have been buoyant during the 1980s and the prospects are for continued growth in the 1990s.

3 Overlapping with these market segments, there has also been growth in the demand for short-break and second holidays across the remainder of the tourist market. Growth in the demand for second holidays has been spurred by increases in work-holiday entitlements and by rising real incomes. However, families with school-aged children are often constrained by inflexible school holiday arrangements which have failed to reflect these other changes. Furthermore, near co-incidence of school holidays both within and across Member States accentuates the problems of seasonality in the Community by further concentrating vacation periods.

Figure 1 : Demand and Supply Elements of Tourism Seasonality



4 Other demand-side constraints contributing to seasonal peaking of holiday-taking include the weather, concentration of work holidays and factory closures in July and August and the long-standing tradition of taking main vacations in these months. Reinforcing these is the "buzz" of crowded resorts, which is part of the holiday experience sought by some vacationers. The 1980s has, however, seen a fall in the influence of some of these factors on seasonal peaking. Trends towards longer work holidays (four weeks work holiday and eight public holidays in Ireland is the lowest across the EC) are also increasing the number of second and short-break holidays. Factory and workplace closures during the holiday season have also become less common. The increased popularity of second holidays has reduced main holiday lengths, while more tourists are seeking quieter and less crowded resort areas.

Supply Developments

5 Complementing, and at times reinforcing, growth in shoulder and off-season

demand there has been a considerable increase in the supply of products catering for, and marketing expenditure devoted to, off-season tourists. Out of season holidays have developed around clusters of different types of holiday products. The main clusters are all-weather facilities, cultural and heritage-based products, sports activities and other health-related tourism products, special interest activities and conference facilities.

6 Analysis of these product categories reveals a number of key pointers to the successful development of off-season products. These factors include:

* clearly identifying target market segments and focusing associated promotional activities at these segments;
* producing attractively designed products or packages which make out-of-season holidays appear worthwhile;
* matching products with target groups;
* ensuring that the holiday or short break is a quality expérience because repeat visits tend to be very important;
* the existence of a number of alternative attractions in the locality/region during the off-season;
* on-going product development and market research because not only does the competition for off-season clientele generally tend to be sharper than for peak season business, but off-season products often compete with high season alternatives.

The importance of these factors varies across product sectors and market segments. For example cultural/heritage products generally need to be marketed in clusters, have additional attractions in the locality or be enhanced by special events such as festivals or re-enactments. On the other hand many all-weather indoor resorts are largely self-contained and cater mainly to short-break visitors.

Competitive Factors

7 To compete with peak season alternatives, off-season and shoulder period holidays generally have to offer more than the corresponding peak season alternative. Price is the competitive factor most often used. The importance of price varies according to the market segment - some off-season market segments are not

inherently price sensitive (conferences and certain sections of the senior citizen and sports holiday markets, for example). However, the level of competition for off-season business in these sectors has made price increasingly important.

8 Many of the examples utilised in this report refer to successful off-season product suppliers and resorts. However, some operators are less professional in their approach, often cutting corners because of the discounted prices and giving many off-season holiday products a down-market image. Concentration on price aspects of off-season "holiday-packages" should not, overshadow the importance of other components, in particular quality and promotion. Pressure on profit margins from over-competitive pricing frequently has a debilitating effect on product quality and on the reputation of holidays at less popular times of the year. Greater appreciation of price/quality mixes by the intermediaries constructing shoulder and off-season holiday packages has an important role to play in improving the seasonal spread of tourism in the longer term.

9 A major challenge facing the industry is how to further increase the number of people willing and able to take vacations in the off-season and to increase the multiplicity of these vacations. While trend factors, as outlined above, are contributing to a greater incidence of off-peak holidays there remains scope for specific initiatives to complement these trends. On the supplier side this action includes product development and improved marketing and promotion, encompassing better targeting and more efficient use of information channels.

10 There are twin gaps, on the demand and supply side, which can be filled by well conceived promotion and information campaigns. Firstly, on the supply side much could be done, for example, to inform tourism suppliers of what products work successfully in the off-season, what form of "packaging" of these products works and how best to promote and market these holidays. Secondly, on the demand side the benefits of off-season holidays in terms of price and other advantages could be better communicated to potential clientele.

Role of National Tourism Authorities

11 On the demand side there is also an important role for state organisations in dismantling some of the constraints which restrict holiday-timing, particularly in relation to school holidays. Alongside the bulking of school holidays in the summer, the weather and "tradition" are the main factors causing seasonal peaking of demand. Given the importance of these factors there will always be much higher demand for holidays during the summer period. National policies aimed at diverting tourists into the off-season can only hope to narrow the differential between various months rather than equalising the spread throughout the year. Thus, policies aimed at reducing peak-time congestion problems such as geographical spreading of tourists, more efficient transport arrangements and better visitor management techniques also need to be devised. Similarly, over-investment in high cost facilities with limited use throughout the year should not be encouraged. In many countries/regions with high seasonal demand, the need for low cost facilities is reflected in the accommodation mix, eg the importance of camping facilities in rural Luxembourg and the Belgian coastal resorts or the frail quality of seasonal accommodation facilities in many French resorts.

12 The promotional policies of national tourism organisations can also contribute to better seasonal spreading of tourism through targetting certain clientele groups and through information campaigns for domestic tourists. Such information campaigns could highlight the advantages of off-season holidays and dispel some of the negative images (downmarket, dull, dominated by the elderly, etc.) which are associated with holidays out of season. Government promotional activities should aim to complement rather than displace those of private sector tourism suppliers. Government agencies may also provide incentives to product development by acting as an information resource on "best practice" in off-season holiday products and promotion.

Community Strategy

13 The Community could play a key role in encouraging different Member States to stagger school holidays, particularly during the summer months, and at another level to help co-ordinate staggering between neighbouring Member

States in the timing of these holidays. The wider net benefits/cost of harmonising public holidays across the EC should be analysed before any moves are taken in this direction.

14 Funding for tourism investments in peripheral regions of the EC should be largely confined to development and marketing of all-season products. There is considerable scope for the Tourism Unit to improve information on the possibilities for off-season holidays on both the supply and demand side. Actions could include information on innovative products and on off-season marketing for tourism suppliers through guide books, quarterly magazines etc. with the use of awards to encourage suppliers to provide information on what is happening in the marketplace. On the demand side, guides and brochures could also be used and the feasibility of improving electronic listings of products could be investigated.

15 There is scope for ameliorating congestion problems through interventions in transport policy and for spreading seasonal arrivals through interventions in the "social tourism" area, although these areas require further research (some are presently being investigated). Regional airports, for example, have particular potential to spread tourism to more remote parts of the Community and this potential merits further examination by the Tourism Unit.

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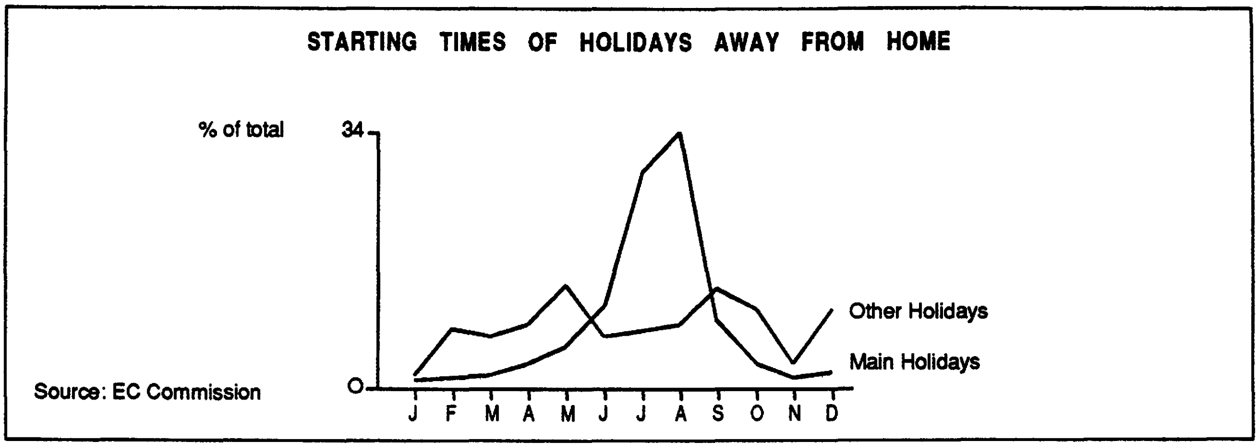
Main Report

1 Overview

Introduction

The existence of seasonal peaks in demand for, and provision of, tourism services in the European Community and elsewhere is well documented. The timing of these peaks can differ - peaks may occur on a daily basis, a weekly basis or, as mainly discussed in this report, at different times of the year. In this report peak season, except where otherwise specified, generally refers to the months of July and August, the shoulder season to May, June, September and October and the off-season to the period November-April.



The report examines the following:

i factors that contribute to the seasonality of tourism arrivals;

ii the problems associated with seasonality;

iii the strategies which can be followed either to spread tourism to other parts of the year or to ameliorate the problems seasonality causes.

The report concentrates on the third topic, ie anti-seasonality strategies.

Factors Influencing the Demand for Holiday-taking

The factors which most influence the timing of demand for tourism in the EC are:

i the vacation periods of schools and workplaces, often determining the times available for holiday-taking;

ii the weather, not only because the most popular types of holiday (based on sun, sea and sand) are heavily dependent on warm weather, but also because most other holidays (mountain, rural, outdoor sports and activities, sightseeing, etc.) are more pleasant in warm weather;

iii based to a certain extent on both of the above points, the summer months have been the traditional times for holiday-taking, although as the number of vacation days available increases the strength of this factor is dissipating;

iv the "buzz" provided in many destinations by large numbers of visitors is a major attraction for many tourists and is difficult to emulate in the off-season. However, some market segments, notably special interest tourists and senior citizens, may prefer to avoid the hustle and bustle associated with the high season.

Of these factors only the timing of school vacations is directly amenable to government action. The timing of work holidays also contributes strongly to the peaking of holiday demand. However, economic reasons for maintaining continuous work operations and government policies have been gradually contributing to a lessening of this problem. Governments can also assist with the development and marketing of off-season attractions which help overcome dependence on the weather.

On the supply side the main factors contributing to the peaking of seasonality are largely based on the interpretation of demand signals. Thus products and promotions concentrate upon attractions and activities which are available in the high season. There is also a tendency for national tourism organisations and local tourist boards to concentrate on the peak season as they attempt to maximise both visitor numbers and revenue. In addition to generating higher prices for tourism services the peak season is generally easier and cheaper to promote.

Problems Associated with Seasonality

The peaking of tourism demand at certain times of the year creates a range of problems both for the European tourism industry and for the wider economy.

These include congestion, environmental damage, under-utilisation of capacity, saturation of transport infrastructure, increased risk of road accidents, higher prices and a negative impact on the quality of the tourism product.

The seriousness of the different problems caused by seasonality varies by Member State, region and activity. Some Member States suffer from traffic congestion and damage to cultural and heritage tourism products through over-utilisation, while the under-utilisation of capacity at off-peak times is the chief concern in other Member States. Seasonality also causes particular problems in certain resort areas, particularly seaside resorts, mountain resorts and the core areas of historic towns.

SEASONALITY PROBLEMS OF SEASIDE RESORTS

The difficulties involved in developing the economies of traditional northern European seaside resorts are often compounded by their dependence on a product (the sea) beyond their control. This leaves them vulnerable to the vagaries of the weather and encourages concentrated seafront development, with some resorts susceptible to problems usually associated with much larger urban areas. The prosperity of the local economy is linked to a very volatile tourism market not just in terms of seasonality, but also in terms of fashion, the latter factor being a major contributor to the cycle of decline (falling revenue -> falling investment, etc) which many resorts have experienced over the last twenty-five years. Accompanying declining investment, many traditional seaside resorts have undergone a massive erosion of the quality of their core visitor areas resulting from:

- the intrusion and demands of motor vehicles which have placed considerable space and environmental pressures on resorts developed in the railway age and ill-equipped to deal with the thoroughfare and parking requirements of heavy road traffic;
- failure to maintain the original harmony of architectural style and quality which has been substantially eroded by ad hoc developments;
- the gradual slide down the market as many hotels and facilities lose their more affluent customers;
- a plethora of intrusive road signs, concrete lamp-posts, commercial lighting etc. which are not consistent with an attractive resort ambience and are frequently exacerbated by the "throw-away" disposable aspects associated with down-market, low spending, seasonal clientele.

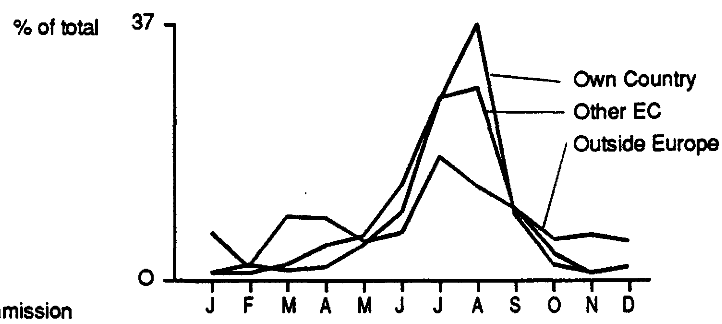
Many seaside resorts also exhibit a structural imbalance in employment, with a lack of full-time, reasonably paid, male job opportunities. Tourism related employment is largely part-time/temporary and low paid. The typical seaside resort also exhibits a disproportionate number of small businesses and self-employment, often inefficiently run. There is evidence to suggest that some resorts are acting as magnets for unemployed young people and families, based upon the false assumption of employment availability and the attraction of cheap accommodation in a pleasant environment by the sea. Such inflows compound the unemployment problems created by the structural imbalance of employment opportunities discussed above.

Recent Trends in Holiday-taking

A range of factors influence the demand for holiday-taking and over the last decade these have been combining to create two trends of central interest to this report. Firstly, growth in the demand for tourism services is continuing to trend upwards. Secondly, the composition of this demand is changing, generally in ways which influence a greater spread of holiday-taking in both time and space.

The importance of short-breaks and second holidays (and shortening lengths for main holidays), which are mainly taken in the "shoulder" and "off-season" months, has grown considerably alongside growth in income and in annual vacation-time. This trend has also contributed to a shortening of the length of main holidays. Income growth in the southern Member States of the EC is encouraging a higher level of international holiday-taking. This growth in international travel may lead to a better geographical, and to a lesser extent seasonal, spreading of demand across the EC. However, increases in domestic holiday-taking in Greece, Portugal and Spain will lead to a greater seasonal peaking in these States. In general, domestic holidays are more concentrated in the peak season than foreign holidays. The importance of long-haul holidays, which tend to be better distributed across the year, will also increase contributing to a global flattening of the seasonality curve.

GRAPH 2 - SEASONAL SPREAD BY DESTINATION - THREE LINES



Source: EC Commission

A more even distribution of holidays is also likely to result from trends away from beach-based holidays and towards more activity and educational-based holidays, while the ageing of the European population will provide a larger market base of people with the flexibility and the inclination to take holidays during the off-peak months of the year.

Overview of Seasonality across the EC

Official tourism statistics across the EC are in the main compiled independently by national agencies in each Member State. This makes comparisons quite difficult. The last pan-EC survey of travel within the Community was conducted in 1985 and so is rather dated, as well as being limited in scope. It indicated sharp seasonal peaking of holiday-taking among EC residents, particularly in the southern Member States.

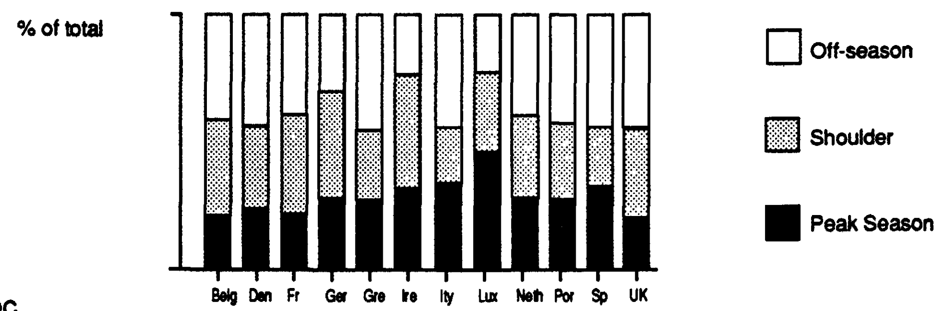
COMMENCEMENT OF MAIN HOLIDAYS - 1985 (% of total)

	Off-season	Shoulder	Peak season
Belgium	7	20	73
Denmark	10	27	63
France	13	22	65
Germany	11	37	52
Greece	9	26	65
Ireland	11	31	58
Italy	7	15	78
Luxembourg	16	35	49
Netherlands	11	29	60
Portugal	5	23	72
Spain	9	22	69
United Kingdom	13	40	47

Source: EC Commission

European Travel Data Center (ETDC) statistics, while unofficial, are compiled on a consistent basis across all EC and Efta countries and are available for 1990. The ETDC statistics, covering a wider variety of foreign trips (all involving an overnight stay), indicate that seasonal peaking is considerably milder, particularly in southern Member States. This reflects the ameliorating impact of including business travel and the sharper peaking of domestic holidays.

OUTGOING FOREIGN TRIPS IN JULY/AUGUST, BY COUNTRY, 1990



Source: ETDC

ETDC figures indicated that EC residents made 172 mn outgoing trips (a further 21 mn were made from Efta countries) in 1990 and 590 mn domestic trips. Outgoing trips were more seasonally peaked - 38 per cent in the July-August period compared to around 34 per cent for domestic trips. However, this reflects the much larger proportion of long holidays in outgoing trips compared to short holiday and business trips. Long duration holidays are the most peaked.

OUTGOING TRIPS BY EC ADULTS, 1990 (% of trips ending during July-Sept)			
Purpose of Trip			
Long Holiday (4+ nights)	45%	Long other leisure	33%
Short Holiday (1-3 nights)	25%	Short other leisure	23%
Business	20%	All trips	38%

Source ETDC

Profiles of each Member State are outlined in Chapter 2 below.

Strategies for Addressing Seasonality

The main thrust of this report is the analysis of strategies for overcoming seasonality and associated problems. The analysis is based on three different categorisations. These are:

a) a market segmentation approach - targeting niche markets which are less influenced by the factors which cause seasonal variations in demand or whose variations are different from the norm;

b) a product-based approach - where the tourism product being sold is less dependent on factors causing seasonal variation, such as school/work holidays or the weather, often targeting the niche markets in a) above;

c) other strategies which directly attack the factors which influence demand, such as institutional factors, price and tastes, or problems such as road and air congestion, overcrowding at resorts etc; and/or encourage trends which reduce seasonality such as short-breaks.

Client markets for off-season vacation are profiled in Chapter 3, Chapter 4 examines suitable products and Chapter 5 analyses other strategies for improving seasonal spread. Chapter 6 examines seasonality policies at a national level, while Chapter 7 develops a strategy for the community.

2 Country Profiles

Belgium

Tourism is not one of Belgium's major industries. A substantial proportion of foreign visitors are transit traffic or are motivated by business/political considerations. Seasonality as a cause of concern ranks much lower than the attraction of higher overall tourism revenues. However, the importance of off-season travel in contributing to this goal is widely recognised.

Seasonality creates relatively few problems in Belgium. There is little traffic congestion and a bias towards investment in facilities whose use is mainly restricted to the summer months (camping facilities, chalets and low-investment social tourism establishments). Holiday-taking by Belgians is quite low for a country at its GNP level, it is heavily peaked and favours domestic holiday destinations well ahead of foreign vacations. The main origin markets for foreign arrivals are the Netherlands, Germany, the UK, France and the US in that order, although Belgium also attracts a high level of transit traffic. In 1989, 44 per cent of hotel overnights were in the two peak months, albeit with considerable regional variations - only 18 per cent of bednights in Brussels were in July and August.

BELGIUM - TOURISM AND SEASONALITY FACT SHEET (% of total)

	Off-season	Shoulder Season	Peak Season
Commencement of Main Holiday, 1985	7 %	20%	73%
Seasonal Spread of Outgoing Trips, 1990	40%	35%	25%
Nights in Hotels, All Tourists, 1989	25%	31%	44%
Nights in Hotels, Brussels, 1989	42%	40%	18%

Accommodation Establishments, domestic tourists, 1989:	Camp sites 40%; Social Tourism Acc. 16%;	Villas/Flats 27%; Hotels 11%.
Main destinations of Belgian holiday-makers, 1988:	Belgium 33%; Spain 13%;	France 20%; Italy 7%.
Long-haul arrivals to Belgium, 1987:	United States 6.0%;	Japan 0.4%.

Responsibility for tourism is shared between the two major regions, with tourism being more important in the Flemish northern region. The main aim of the Belgian tourism promotion agencies is to create a "tourism image" for the country rather than to spread arrivals. There is no staggering of summer holidays in schools in Belgium, despite the efforts of national tourism organisations to interest the government in such a policy. There are slight differences in holidays at other times of the year.

While the coastal belt with its highly seasonal beach resorts is popular with domestic tourists, international holiday-makers are largely attracted by non-seasonal products such as "historic towns", gastronomic tours, special events and festivals and conferences. Belgium has eight tourist overseas offices including Japan and the US, where culture/heritage products are highlighted.

Denmark

As in Belgium, tourism is not one of Denmark's major industries and until recently seasonality was not considered a key issue. Again like Belgium, seasonality does not create major problems for Denmark, with limited traffic congestion despite the importance of the country as a transit point for land journeys to and from Scandinavia. There are some specific seasonal congestion problems such as heavy utilisation of coastal marinas during the summer. Low levels of utilisation of facilities, particularly hotels, and the potential for creation of a downward spiral of lower investment leading to lower revenues etc. are the main causes for concern. The Danish travel market is relatively mature and net travel intensity is close to 70 per cent. The Danes have a well-developed package holiday industry and appear to be willing to travel out of season, with just 52 per cent starting their main holiday in July and August in 1986. The main origin markets for foreign arrivals are Germany and the other Scandinavian countries. In 1989, hotel accommodation overnights were quite sharply peaked with 48 per cent of the annual total in the two peak months, 30 per cent of them in July.

DENMARK - TOURISM AND SEASONALITY FACT SHEET (% of total)

	Off-season	Shoulder Season	Peak Season
Commencement of Main Holiday, 1985	10%	27%	63%
Seasonal Spread of Outgoing Trips, 1990	42%	32%	26%
Accommodation Nights, all tourists, 1989	18%	34%	48%

Main foreign destinations of Danish tourists, 1991: Germany 12%; Spain 12%; France 10%; Norway 10%.

The Danish government's interest in addressing the problems of seasonal arrivals of tourists is fairly recent. While school holidays are not staggered at present, in recent years the interests of a wide range of organisations have been canvassed and found largely in favour of such a move. A major worry, articulated by the Danes, and implicit in the actions of many tourism interests from resorts to national organisations, is that spreading tourism arrivals will have negative developments on peak season utilisation rates. Most of the work on developing initiatives to encourage a better seasonal spread in the Danish tourism industry is still on-going. Those which have emerged include: the encouragement of co-operation within and across tourism sectors to develop linked off-season products; the strengthening of Copenhagen as an off-season tourism destination, particularly for conferences; the removal of 50 per cent marketing subsidies from promotions relating to the peak season; priority for attracting short-break holidays from short-haul international markets with customised brochures; greater emphasis on off-season products in general promotional brochures; and selectivity in providing government funding of product development.

France

Tourism is very important in France, contributing 7 per cent of GNP in 1989. French holiday-taking is strongly peaked, reflecting the importance of domestic vacations (78 per cent of the total), with 65 per cent of main holidays commencing in either July or August in 1985. More recent surveys indicate some amelioration of this trend. France is the second most important international tourism destination, attracting around 50 mn overseas visitors in 1989. Germany, UK, Italy and the US are the main origin markets. In 1989, 62 per cent of overnights were recorded in the second and third quarters of the year.

FRANCE - TOURISM AND SEASONALITY FACT SHEET (% of total)

	Off-season	Shoulder Season	Peak Season
Commencement of Main Holiday, 1985	13%	22%	65%
Seasonal Spread of Outgoing Trips, 1990	38%	38%	24%
Seasonal Spread of Domestic Travel, 1989/90	20%	15%	65%

Foreign destinations of French holiday-makers, 1990: Spain 19%; Portugal 15%; Italy 11%; UK/Irl. 6%.

Long-haul arrivals to France, 1988: United States 5.1%; Japan 1.7%.

France's approach to seasonality has developed from being relatively low-key in the early 1980s to relatively active over the last five years. Since the establishment of Maison de la France as the main promotional body for French tourism in 1986, international promotions have increasingly featured off-season attractions and used product-based marketing strategies. Maison de la France has also focused on the key market segments of long-haul travel and short-breaks for spreading demand into the shoulder and off-peak periods. At present there is no staggering of summer holidays for schools, despite relatively successful experiences with staggering winter holidays.

The French government have been active in trying to encourage greater staggering of work holidays, issuing a practical guide to such arrangements and setting up a system of awards for firms making noteworthy efforts in this regard. France has been at the forefront of developing schemes for holidays for the under-privileged. While initially these schemes contributed to greater seasonality of holiday-taking, social tourism organisations are now at the forefront of moves to flatten the seasonal profile of this sector.

Germany

While tourism accounted for only 4.6 per cent of West German GNP in 1988, Germans (excluding the former East Germany) have a high leisure travel intensity and spend about twice as many travel days abroad as in Germany. Main holidays are relatively well spread - 52 per cent commencing in July or August in 1985. Surveys indicate that factors such as age, education and professional status are important determinants of the type and form of holiday destination chosen by Germans, but that in general there has been an increase during the 1980s in holidays with an educational or activity component. While neighbouring countries, particularly the Netherlands and Austria, are the top origin markets the fastest growth has been in long-haul travel from Japan and the US.

GERMANY - TOURISM AND SEASONALITY FACT SHEET (% of total)

	Off-season	Shoulder Season	Peak Season
Commencement of Main Holiday, 1985	11%	37%	52%
Seasonal Spread of Outgoing Trips, 1990	30%	41%	29%
Accommodation Nights, all tourists, 1989	36%	40%	24%

Types of holidays taken by foreign visitors, 1989:	Tours 23%; Mountains 18%;	City Visits 18%; VFR 14%.
Motivation of foreign trips to Germany, 1989:	Long Holiday 24%; Tradl. Business 18%;	Short Holiday 23%; Influenceable Bus. 10%.

Tourism policy at a Federal level is largely advisory and emanates from a division within the Ministry of Economic Affairs. Policy-making is largely the responsibility of individual regional tourism organisations. With the exception of Bavaria, the German Länder have successfully run a staggered summer holiday system on a five year rotational basis since the early 1970s.

Overseas marketing of Germany is the responsibility of the Deutsche Zentrale für Tourismus (DZT), whose primary aim is the promotion of Germany as a whole while striving to play a neutral role between the individual Länder. Thus, while improving seasonal spread is not part of DZT's brief, except insofar as it improves overall visitor volumes and revenue, the requirement to promote lesser well-known regions helps to address some of the problems of seasonality. It spreads visitors out of the more crowded regions focusing on the generally non-seasonal products of these regions. In general, German tourist products are suitable for off-season promotions and the DZT also focus heavily on the Japanese market using touring routes based on the images of culture, heritage, fairytales and romance.

Greece

Tourism is very important to the Greek economy and contributed 7.3 per cent of GNP in 1988. Holiday-taking amongst the Greeks themselves is relatively low, and is heavily concentrated in July and August - 67 per cent of main holidays commenced in those months in 1985. Inbound tourism is also very sharply peaked, reflecting the importance of "sun, sea and sand" holidays. The main origin markets are Germany, the UK, Italy and the Netherlands, with growth from all except Italy slowing during the second half of the 1980s.

GREECE - TOURISM AND SEASONALITY FACT SHEET (% of total)

	Off-season	Shoulder Season	Peak Season
Commencement of Main Holiday, 1985	9%	26%	65%
Seasonal Spread of Outgoing Trips, 1990	47%	28%	25%
Nights in Hotels, All Tourists, 1989	17%	47%	36%

Long-haul arrivals to Greece, 1988: United States 3.8%; Japan 1.4%.

Alleviation of seasonality and of problems associated with it has been an explicit policy objective of the Greek tourism authorities since the 1970s and a relatively interventionist approach has been taken. Policies have included subsidisation of hotels to enable them to stay open in the off-season and funding to develop off-season products. Policies also have been formulated to address associated problems such as congestion in the high season and the potential damage to Greece's cultural and heritage products from over-crowding and heavy utilisation. For example, recent government initiatives have tried to re-direct construction away from over-built resorts to areas which are perceived as underdeveloped, have placed restrictions on filghts over Athens and restricted visitor access to some cultural attractions. Over the last decade the National Tourism Organisation of Greece (NTOG) has increased its emphasis on the promotion of off-season products such as health and spa resorts, winter sports and mountain-based activities such as hiking. While a greater share of resources was also allocated to promoting travel to Greece among market segments more willing to travel in the off-season, particularly conferences, the Greek Convention Bureau office opened in the UK has subsequently been forced to close due to cut-backs.

Ireland

Tourism is of moderate, but increasing, importance to the Irish economy. Considering average levels of income the Irish are relatively keen international travellers and there is potential for further growth. Holiday-taking is moderately peaked - in 1986 55 per cent started their main holiday in July or August. The UK is the main destination for Irish travellers, followed by Spain. The UK and the US are the main origin markets, although the importance of other EC countries has grown very rapidly over the last three years. Arrivals by international visitors are quite well spread and Ireland attracts a high proportion of North American visitors in the shoulder season.

IRELAND - TOURISM AND SEASONALITY FACT SHEET (% of total)

	Off-season	Shoulder Season	Peak Season
Commencement of Main Holiday, 1985	11%	31%	58%
Seasonal Spread of Overseas Arrivals, 1990	39%	43%	29%
Motivation of foreign trips to Ireland, 1990:	Holiday 47%; Business 19%;		VFR 41%; Other 16%.

The position of the Irish government in relation to tourism policy is relatively interventionist, although like many EC Member States the problems created by seasonality have not been well addressed until recently. Increasing in-bound tourism is a major component of government economic and job-creation policy. School holidays are not staggered. Despite a commitment to investigate re-scheduling of work and school holidays in a 1985 policy paper, little has been done in this regard. On the other hand, with the aid of substantial financing from EC Structural Funds, there has been considerable development and marketing of products which can be utilised in the off-season. The Irish Tourist Board (Bord Failte), in the larger context of increasing overall tourism numbers, has been heavily promoting Ireland in the off-season on both a product-based front (fishing, genealogy-based products, golf, etc) and by targeting specific market segments (senior citizens, affinity groups and incentive travellers). Bord Failte also plays an important role in canvassing tourism suppliers regarding specially discounted off-season packages and coordinating the promotion of these packages. In general, Ireland suffers little from peak season problems such as traffic congestion or damage to heritage attractions and seasonality problems have traditionally been viewed in terms of under-utilisation.

Italy

Tourism is also of moderate importance to the Italian economy. International travel by Italians has increased considerably in recent years, although most still take their vacations within Italy. Holiday-taking is very sharply peaked with 78 per cent commencing in July or August in 1985 and is heavily influenced by institutional factors such as work and school holidays. Germany is by far the largest source market for tourists to Italy, followed by France, the UK and Switzerland.

ITALY - TOURISM AND SEASONALITY FACT SHEET (% of total)

	Off-season	Shoulder Season	Peak Season
Commencement of Main Holiday, 1985	7%	15%	78%
Seasonal Spread of Outgoing Trips, 1990	42%	22%	36%
Seasonal Spread of Overseas Arrivals, 1989	35%	37%	28%
Nights in Hotels, All Tourists, 1989	25%	33%	42%

Motivation of Choice of Holiday Period, 1985: Own Choice 25%; School Holidays 37%; Firm Closed 10%; Family Reasons 9%.

Long-haul arrivals to Italy, 1989: United States 2.5%; Japan 0.8%.

Despite the importance of the tourism industry in Italy, it has a low profile in overall government policy with responsibility mainly delegated to regional and local levels. ENIT is the government agency charged with promotion of Italy but seasonality is not high on either ENIT or the government's agendas.

During the 1980s, new tourism product development occurred outside the traditional areas of culture and beaches and included products aimed at the conference market, agri-tourism market and health and sports activities. School holidays are staggered to a limited extent because individual regions have some discretion over the starting and ending of summer holidays. However, Italy's summer holidays are very long and these small variations have little impact on the tourist industry. Italian roads, art cities and seaside resorts suffer from substantial overcrowding during the peak season and a variety of measures have been proposed to ameliorate congestion problems. Problems caused by congestion at peak times at various locations are dealt with at local level, such as the banning of tourist arrivals by car during August at the island resort of Ponza and control of visitor numbers in Florence.

Luxembourg

After financial services and steel, tourism is Luxembourg's most important industry. The main origin markets are the neighbouring countries of the Netherlands, Belgium, France and Germany. A heavy proportion of inbound travel is work-motivated and the city of Luxembourg has few seasonality problems. Rural Luxembourg, however, attracts virtually no tourists during the off-season with the result that most of the tourism infra-structure closes for the winter.

LUXEMBOURG - TOURISM AND SEASONALITY FACT SHEET (% of total)

	Off-season	Shoulder Season	Peak Season
Commencement of Main Holiday, 1985	16%	35%	49%
Seasonal Spread of Outgoing Trips, 1990	25%	32%	43%
Accommodation Nights, All Tourists, 1989	20%	31%	49%

Luxembourg has a separate Ministry of Tourism, reflecting the importance of the industry to the economy. It is important to distinguish between policies to spread the season in rural Luxembourg and in the city. In the former area the main concentration is on spreading the season into the shoulder period through encouraging attractions to stay open for longer periods of the year and encouraging suppliers to provide attractively packaged and priced shoulder season breaks. There is limited scope at present for boosting winter breaks, although this is not a major concern as a high proportion of the tourism infra-structure is geared towards summer accommodation and activities. In the city, on the other hand, there is scope for extension of the season into the winter months and promotions to attract conferences and short-break holiday-makers are pursued.

The Netherlands

The tourist industry is relatively unimportant in the Netherlands, although the Dutch are among the most frequent holiday-takers in Europe and the volume of domestic holidays is increasing. In 1985 60 per cent of the Dutch commenced their main holiday in July or August, but seasonal spreading has improved since then. The biggest origin market is Germany. It accounted for nearly half of non-resident overnights in 1989 and is heavily concentrated in the peak months.

THE NETHERLANDS - TOURISM AND SEASONALITY FACT SHEET (% of total)

	Off-season	Shoulder Season	Peak Season
Commencement of Main Holiday, 1985	11%	29%	60%
Seasonal Spread of Outgoing Trips, 1990	38%	34%	28%
Seasonal Spread of Domestic Overnights, 1989	16%	36%	48%
Seasonal Spread of Domestic Holidays, 1989	23%	45%	32%

Destinations of Domestic Holiday-makers, 1989: Woods/Moors 58%; Seaside 20%; Lakes/Rivers 17%; Others 5%.

Main Origin Markets, Accommodation Nights, 1989 Germany 49%; UK 11%; Belg/Lux 7%.

In the Netherlands there has been considerable activity by tourism bodies to spread the holiday-taking of domestic tourists across the year. The motivation has been less the result of concern about peak-season congestion, than a concern with maximising resource usage - there was a realization that there was considerable capacity under-utilisation in the tourism industry in the off-season and an associated desire to increase overall tourism revenues generated within the Netherlands.

A staggered summer school holiday system was introduced in the 1970s. This divides the country into three regions. Other methods of introducing greater flexibility into the school holiday system are now being investigated. Each year a promotional campaign is also launched by the Netherlands Board of Tourism to persuade the Dutch to holiday in the off-season. International promotion of the Netherlands is primarily aimed at increasing visitor numbers and revenue, with the emphasis on the peak and shoulder seasons. There is also emphasis, however, on developing short-breaks and on attracting conferences. The Netherlands has a scheme to subsidise international conferences which appears to have worked well, reflected in an increased share of international meetings for Amsterdam in recent years.

Portugal

Tourism is of considerable importance to the Portuguese economy. Domestic holiday-taking is very low, but sharply peaked with 72 per cent of holidays commencing in July or August in 1985. The main origin markets are the UK, Germany and Spain in terms of bednights, although a high number of day-trippers also arrive from Spain. International arrivals are also highly seasonal, with about a third of all bednights in the months of July and August. Portugal also has a strong geographic concentration of visitors around Lisbon and the Algarve.

PORTUGAL - TOURISM AND SEASONALITY FACT SHEET (% of total)

	Off-season	Shoulder Season	Peak Season
Commencement of Main Holiday, 1985	5%	23%	72%
Seasonal Spread of Outgoing Trips, 1990	41%	30%	29%
Accommodation Overnights, all tourists, 1989	29%	36%	35%
Non-Scheduled Air Passenger Movements, 1989	28%	38%	24%

Motivations of foreign tourists, 1986: Holiday 89%; Business 5%; Others 6%.

Long Haul Arrivals to Portugal, 1989 United States 1.4%; Japan 0.2%.

In Portugal the tourism industry has its own Secretary of State. While seasonality is regarded as an important problem it is linked with some of the other concerns of the Portuguese authorities, namely geographical concentration and dependence on low-cost mass tourism based on beach holidays. Thus, product development strategies have centred on areas such as sports, culture and heritage and in particular on the development of the latter products in interior regions. Promotion has concentrated on these products and the market segments associated with them, as well as on target groups with the desire and/ or the flexibility to travel in the off-season - these markets include Japan, Brazil, senior citizens and special interest groups.

Spain

Tourism, Spain's most important industry, suffers from both seasonal and spatial concentration problems. Domestic holiday-taking is sharply peaked, with 69 per cent of Spaniards commencing their main holiday in July and August in 1985. Arrivals of international tourists to mainland Spain are also highly seasonal, although the peak tends to be spread into the shoulder period with a sharp fall-off in the winter months.

SPAIN - TOURISM AND SEASONALITY FACT SHEET (% of total)

	Off-season	Shoulder Season	Peak Season
Commencement of Main Holiday, 1985	9 %	22%	69%
Seasonal Spread of Outgoing Trips, 1990	45%	24%	26%
Accommodation Overnights, all tourists, 1989	33%	40%	27%
Non-Scheduled Air Passenger Movements, 1989	35%	40%	25%
Road Entries, Seasonal Spread, 1990	33%	30%	37%

The strategies of the Spanish tourism authorities for addressing seasonality are intertwined with policies aimed at counter-acting demand for Spain's staple beach-tourism product. Their strategy aims to improve the quality of the Spanish tourism product, including that of interior Spanish regions, diversifying into origin markets which are more likely to supply tourists during the off-season and placing more emphasis on non-weather dependent products.

Turespaña's promotional emphasis has shifted towards advertising a broader range of tourism products and using the slogan "Everything under the Sun", indicating the diversity of Spain's attractions while retaining its image as a sunshine destination. Turespaña have also assisted regional tourism authorities to create products closely related to the demands of certain client markets such as business tourists, more discerning culture-oriented tourists and international short-break tourists. Spain has also started to promote itself heavily in the Japanese market and has been one of Europe's fastest growing recipients of Japanese tourists. There has never been any attempt to stagger school holidays and despite the sharp peaking of domestic demand little has been done to try and spread Spanish holiday-taking patterns.

The UK

Tourism is of moderate importance to the UK economy. The UK has the broadest spread of travel patterns, both inbound and outbound, of any Member State. In 1985, 47 per cent of UK residents commenced their holidays in July and August. International arrivals were also well spread, with only 25 per cent of international tourist arrivals arriving in the months of July and August in 1990. The latter reflects the broad spread of international arrivals from different markets, particularly long-haul markets, with north America accounting for 21 per cent of the 1990 total. Also important is the weather-independent nature of many of the UK's tourism products, especially in the areas of heritage. Nevertheless, there are congestion problems at certain attractions and in some resort areas.

UNITED KINGDOM - TOURISM AND SEASONALITY FACT SHEET (% of total)

	Off-season	Shoulder Season	Peak Season
Commencement of Main Holiday, 1985	13%	40%	47%
Seasonal Spread of Outgoing Trips, 1990	45%	34%	21%
Border Arrivals, Foreign Tourists, 1990	39%	36%	25%
Long-haul arrivals to The UK, 1989	US 16.3%;	Austl/NZ 3.8%;	Japan 2.9%.

The UK government's stance towards tourism is largely non-interventionist. However, a better seasonal distribution of visitors through promotion and the provision of information on suitable product ideas and target markets has been an important component of UK tourism policy. This policy appears to have worked reasonably well. The campaign to educate the tourism industry to the potential for generating off-season tourism business has included: the publication of booklets detailing case-studies of successful off-season product development and marketing; the provision of information along similar lines using both case studies and profiles of tourism areas in ETB's *Insights*; snippets of information on off-season tourism issues and developments in a quarterly publication (now discontinued) called *Operation Off-Peak*; the use of a "dial-an-idea" service which gave tourism interests access to a specialist in off-season products and marketing techniques; and monthly awards for the best products developed.

The tourism authorities also help to co-ordinate the promotion of special off-season packages aimed at the international and domestic markets. International promotion is widely spread and, while there is no emphasis on seasonal elements, the high proportion of long-haul tourists attracted helps the spread of international arrivals. There is no policy for staggering school holidays in the UK, although the idea has been investigated on a number of occasions, including recent analysis of the feasibility of a four-term school year.

3 Clientele for Off-Season Tourism

This chapter covers the main clientele for off-season tourism, including long-haul tourists, business travellers, youth, the over-55s, special-interest tourists, and certain socio-economic market segments.

Long-Haul Tourists

In long-haul origin markets seasonal issues are different from those in Europe. In many of these countries the institutional factors which influence the pattern of holiday-taking result in different seasonal patterns from those which are causing problems in European countries. Many US visitors to Europe are attracted on the basis of its culture and heritage rather than its beach resorts. Thus, weather factors are less of an issue, although they may be regarded as a bonus. In southern hemisphere countries the weather and other cultural/ institutional factors result in the peak holiday season falling in January and February, out-of-season months in the EC.

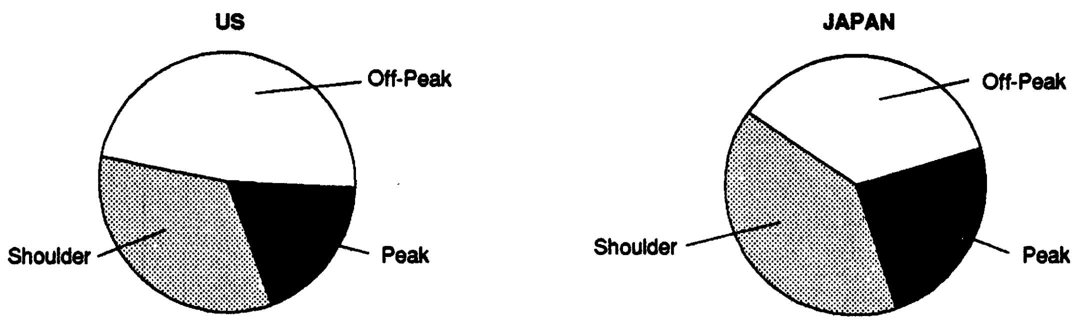
Long-haul trips from South America (particularly Argentina, Brazil and Uruguay) to Europe represent a small but increasing market segment. The propensity for European travel varies considerably across the different countries - 46 per cent of outbound Brazilians travelled to Europe in 1988, while the corresponding shares for Argentina and Uruguay were 15 per cent and 1 per cent respectively. In 1988 there were 1.5 mn South American visitors to Europe, with almost 40 per cent coming from Brazil. Most of these holiday trips are, however, taken during the European peak period and there is little prospect of South America becoming a major origin market for European holidays even in the medium term.

North American travel to Europe is much more important. "European Heritage" links and the tendency to take long breaks suggest that this market offers potential for boosting arrivals and revenue in the shoulder months of June and September. There were 7.5 mn trips from the US to Europe in 1990, although the market is quite volatile and fluctuates sharply in response to short-term political and economic developments. There is considerable potential for increases in US foreign travel. It is estimated that a total of 12,000 mn overnight trips are taken by US citizens each year, of which only 14 mn are to foreign destinations. Only 8.5 per cent of the population hold a valid passport. There are, however, a number of factors which could potentially constrain the growth of US travel to Europe:

* unlike Europe and Japan the over 55s are not the most rapidly growing population segment. While this segment will still be of increased importance during the 1990s the fastest growing segment will be the over 75s who are much less likely to travel overseas;
* the share of the US population that could be characterised as having a "European heritage" is declining;
* geographical shifts of the US population, southward and westward, are unlikely to benefit easterly travel to European destinations.

On the other hand, growth in US business travel will help to flatten seasonality of demand while downward pressure on fares resulting from the increased importance of American carriers should reduce the cost of transatlantic travel.

SEASONAL DISTRIBUTION OF US AND JAPANESE ARRIVALS



Source: US Department of Transport

Source: Japanese Travel Bureau

The number of Japanese visitors to Europe more than doubled between 1985 and 1990 (to 1.1 mn trips). The Gulf war caused a temporary drop in 1991, but increased growth is expected to continue. The factors behind this growth have included:

* growth in Japanese incomes;
* greater availability of leisure time and a change in attitudes to leisure and work;
* changing attitudes to overseas travel among the Japanese aided by the appreciation of the Yen;
* links between overseas travel and increased Japanese overseas investment;
* government initiatives including overseas travel promotion campaigns, easing

of restrictions, the use of fiscal incentives, air transport policy and the campaign against workaholism;

* promotions by EC tourist agencies.

Only 20 per cent of Japanese trips to Europe are made during July and August, while 46 per cent of Japanese visitors arrive during the six off-season months. This seasonal spread is helped by factors such as cheap pricing by airlines, and niche markets such as "honeymooners" and "students". The majority of Japanese marriages occur between October and December and March and May, while graduation trips are taken between February and April. The single "office" lady and senior citizen markets are also growing rapidly but are more likely to travel in the shoulder or peak seasons.

JAPANESE NICHE MARKETS

The Japan Travel Bureau (JTB) reports that well over 90 per cent of Japanese couples go abroad on their honeymoon, accounting for over 2 mn overseas visits in 1990. Europe's share of this market was on an upward path until the intervention of the Gulf war at end 1990. Popular honeymoon itineraries in Europe include cruising in the Aegean, the highlight city route, Switzerland/Austria and the romantic/fairy-tale routes in Germany.

About 30 per cent of all graduating university and college students make an overseas trip during the February and March, before the traditional starting date for most people's working career. The general university student market is also important - around 3 mn people. The Japanese educational system places most pressure on primary and secondary school students and university offers many Japanese (particularly men) their main lifetime opportunity for relaxation. Graduation trips are generally wholly or partly financed by parents as graduation gifts, by savings from part time work or by bank loans - thus, lengthy trips to Europe are generally financially feasible. The remainder of the student market is, however, price sensitive. Another off-season component of this market is students seeking homestay and study programmes, often with the additional/primary aim of seeking to learn one or more European languages.

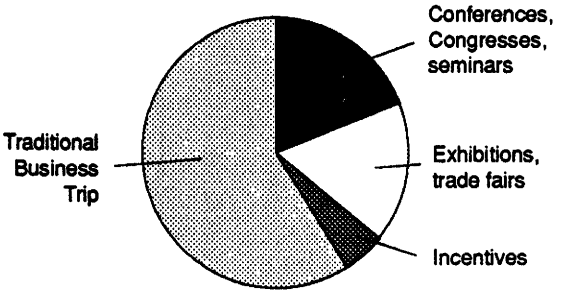
Of the 20 to 29 year age group travelling to Europe in 1990, over two-thirds were women, despite the more male-dominated student sub-section, reflecting the importance of what some marketing analysts call the "office lady" niche. Japanese women in their 20s have been in the vanguard of the overseas travel boom and accounted for 9 per cent of all visitors to Europe in 1990 (including business travellers). The relative importance of this segment is also likely to continue to grow. As social mores in Japan continue to change and more single Japanese women attain greater social and economic independence, rising disposable incomes and later marriages will continue to fuel demand in this market segment - overseas travel also enhances the "marriageability and status" of young Japanese women. This market is highly motivated by fashion and image with high expenditure on shopping for branded goods (under 25s being relatively more price conscious), although culture and scenery are regarded as important.
The senior citizens market is already quite substantial - there are 37 mn Japanese over 50. As Japan's population ages the number of elderly will continue to expand significantly. Government projections indicate 37 per cent of the population will be 50 by the year 2000. These holidaymakers tend to be well-off. It is a market not confined to particular seasons and is generally high quality with participants often choosing brand packages at the top end of the market. The majority of the over-50s market are women. Their interests are mainly history, art, culture and shopping and they have little wish to travel with their husbands. Major constraints include worries about health and safety. With the associated importance of the "office ladies" and "honeymoon" market segments the image of Europe as a destination projected by promotional campaigns increasingly reflects female values.

Japanese holiday-makers expect a high level of service and attention to detail, including a lot of staff on duty, good quality and varied meals, high standards of cleanliness and hygiene, and they also appreciate gestures such as staff with some basic Japanese phrases, signs in Japanese, a cup of green tea at bed-time etc. The prospects for continued growth in Japanese travel to Europe are favourable on the demand side as the factors which have underpinned increases in the 1980s will continue to operate. The main constraints are on the supply side and include shortages of Japanese speakers in Europe, airport capacity constraints and lack of sufficient high grade accommodation catering to Japanese requirements.

Business Travel

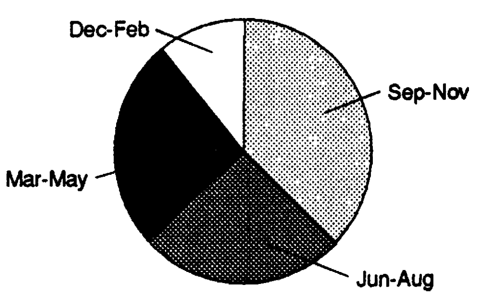
Business travellers play an important role in easing some of the effects of the seasonal incidence of holiday-taking since business activities within Member States, and thus trips, are generally reduced during the peak season. Business travel within Member States is particularly important, representing the largest market for hotel accommodation. While many business travellers journey in response to economic or business environment signals, a substantial proportion of business trips, ie conventions, conferences and incentive travel, may be influenced in order to reduce seasonality. Within the EC, Germany and the UK are the principal markets for outbound business travel.

PURPOSE OF WEST EUROPEAN BUSINESS, 1990



Source: ETDC

SEASONALITY OF INTERNATIONAL MEETINGS

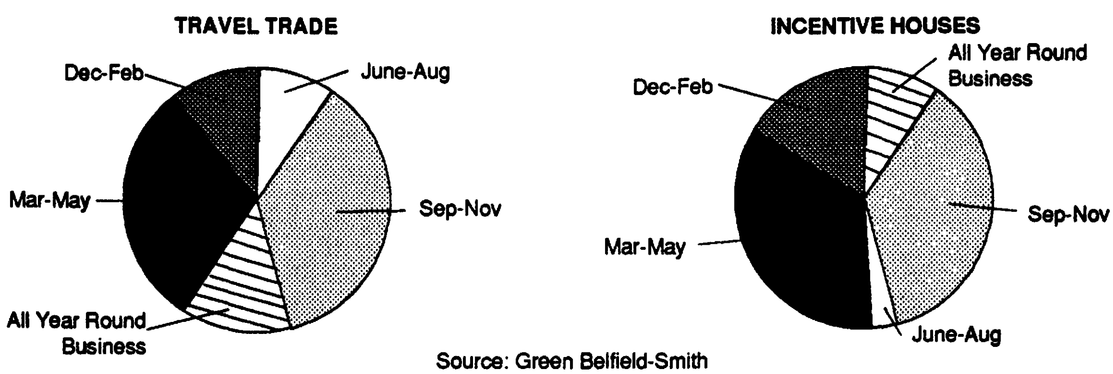


Source: UIA

The international market for conferences, meetings, trade exhibitions, seminars etc., has become increasingly competitive over the last decade. The importance of this market both in terms of the high per capita spending of delegates and as a device for increasing off-season occupancy rates has been recognised by a substantial number of countries and cities. High revenue generation stems from expenditure on accommodation, food, beverages and gifts at the top end of the market, as well as expenditure on local business and support services. The increasing competition for, and complexity of organising, conferences has seen the growth in recent years of professional conference organisers (PCOs) and destination management companies (DMCs) - ground handling agents, who specialise in catering for incoming groups.

The most popular months for international meetings are the shoulder months of October and September. The conference market is particularly important to the hotel industry as it increases occupancy rates during the off-peak season. Many early conference centres were of a rudimentary nature, often adaptations of buildings constructed for other purposes, and bear little relationship to modern facilities. At the top end of the scale, modern facilities include exhibition halls for trade shows, meeting rooms capable of accommodating as many as 3,000 delegates, areas for group registration and administration, and of course the full range of audio-visual facilities and communications centres to handle the needs of a major international conference gathering.

INCENTIVE TRAVEL BUYERS, 1990



Source: Green Belfield-Smith

Incentive travel was originally conceived as a motivational tool to reward sales and marketing staff within an organization. The role of incentive travel has since expanded to include all those within a firm who meet targets and goals. Incentive travellers require high service and quality, and demand for incentive travel generally peaks in the spring and autumn. Specific tailored attractions are key elements in marketing incentive travel destinations - unusual, high-profile or unique events, the recalling of which the incentive travellers can use to impress their peers. Examples would include a banquet in a renowned art gallery or golf lessons from a famous golfer. Add-on surprises to incentive holidays such as theme parties, extravagant banquets etc, are important selling points to the buyers. The north American market is the key generator of demand. However, there has also been substantial growth in Europe.

The conference and incentive travel markets are among the most competitive and sought-after in the tourist trade. Many major cities within the EC have built large publicly-funded centres for holding high profile international meetings, while some Member States offer financial incentives to attract international meetings (the Netherlands) or financial aid to private operators to build conference centres. The more numerous national meetings in smaller venues, often attached to hotels, are equally important, and in many traditional resorts they provide substantial off-season business to supplement summer tourism.

HEIDELBERG AND THE CONFERENCE MARKET

Heidelberg in Germany runs a very successful conference business throughout most of the year. While there is a wide range of different sizes and grades of conference facilities spread through hotels throughout the city, the niche marketing activities successfully undertaken by the municipal conference hall are worth examining in greater detail. While other types of conferences are also held, the Kongresshaus-Stadthalle tends to specialise in research and higher education oriented conferences attracted with the help of Heidelberg University. Similar types of conferences are also directed towards the conference centres attached to the city's larger hotels. The number of events in the Kongresshaus-Stadthalle has grown substantially over the last decade, with 873 events in 1990 compared to 217 in 1980. These events are spread throughout the year. In 1990, March, May, June and September were the busiest months with 100 per cent utilisation in September and over 80 per cent in each of the other three months. In fact over-utilisation occurs in the peak months - Heidelberg Tourism Office (HTO) would prefer to have more days free to utilise the hall for other occasional events. Only in July and August (the traditional peak months) was there substantial non-utilisation of the hall's capacity.

Marketing Heidelberg's municipal conference capabilities and advantages abroad has three separate strands:

- traditional methods using their conference brochure, generally in conjunction with other conference facility suppliers;
- the more broadly based promotion of Heidelberg as a centre of learning and research;
- utilising the contacts of the academics at Heidelberg University. The HTO actively developed programmes with the universities to encourage conferences and their Congress and Incoming Services unit helps professors to organise conferences etc.

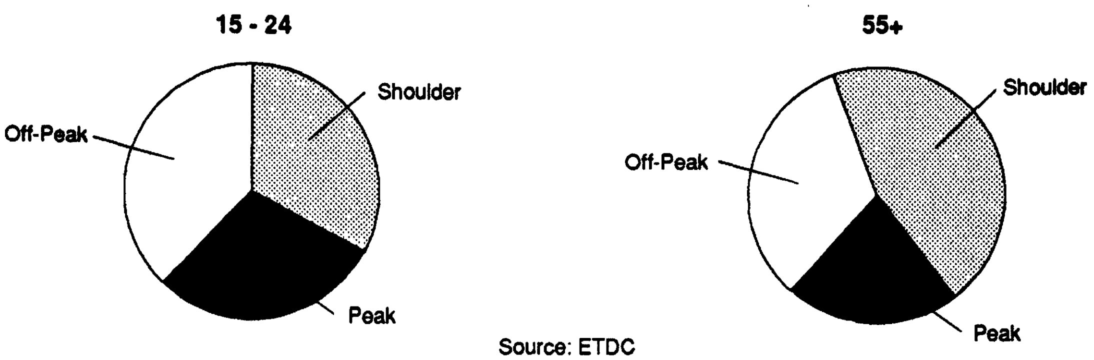
Incentive travel is also regarded as important (for the small/medium hotels) and is targeted via the tourist office's briefings and literature mailings to scientific/research staff in corporations and other public and private organisations. They also use incentive travel houses such as EF McDonald and Maritz to develop their incentive travel trade while the management and sales staff sectors are dominated by the larger hotels. However, the city recognises the different paths education and business are taking and the greater need for seeing education as a continuous learning process. The city is therefore continually developing management schools and running courses throughout the year.

Market Segmentation by Age

The youth travel market has an above average growth rate and represents over 17 per cent of world travel. As a result of educational holidays and discount travel prices youth travel distribution is skewed towards the summer season.

The youth markets are relatively price conscious due to low budget finances and are therefore tempted by incentives with respect to destination and date of departure, once it is within their own personal constraints.

SEASONAL SPREAD OF OUTGOING TRIPS



Source: ETDC

The third-age or senior citizen market represents a very important, albeit heterogeneous, market segment at which to target off-season tourism products. This group has a general preference for out of season months, an increasing propensity to travel and a tendency to take longer holidays, and it is growing very rapidly. By the year 2000 one in four Europeans will be over 55 and one in five over 65.

CATERING FOR SENIOR CITIZENS

Senior citizens are a multi-segmented market sector, reflecting the varied physical and intellectual characteristics of those concerned. Many senior citizens prefer to travel in groups, often coach-based touring holidays, and there are some general characteristics and preferences which are worth noting:

- they enjoy scenic attractions and cultural activities including beautiful countryside, good architecture, interesting cities and cultural attractions. Peace and quiet is also considered important with good weather a welcome bonus;
- well adapted (eg wheelchair access or extra steps to board coaches) and comfortable transport means and accommodation (particularly well-heated during winter period). Accommodation located close to villages/towns and public transport facilities is preferred;
- the availability of fast medical assistance is also important, particularly for more elderly tourists, and for off-season holidayers the quality of all facilities (security, hygiene, correct functioning of equipment etc.) should be maintained;
- scheduling of excursions etc is also important, and clear and full explanations of such trips should be provided. In particular, long excursions and travelling by coach over substantial distances without stopping should be avoided. Several nights at the same hotel, organising excursions from the same city each time, rather than moving each night on a city-to-city travel basis is often preferable;
- attentiveness by tour guides, hotel staff, drivers to the needs of the elderly;
- activities are also important although the types which are favoured often differ with the age of the tourists - some holiday-makers report programmes which are too hectic while others complain of too little to do. Care to ensure that travellers on organised tours have ample opportunity to mix and socialise is particularly important.

As the number of people between 55 and 65 increases, there is likely to be a growing demand for activity holidays. Although these will be less energetic than those currently on offer to the young, there will be increased demand for holidays for education and excitement as well as for relaxation.

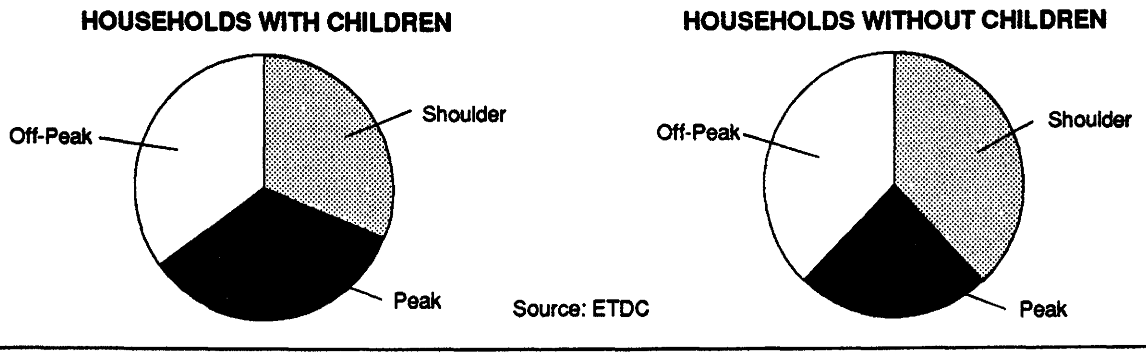
The two main EC sources of third-age tourism are the UK and Germany. While the elderly British are more inclined to take their holidays abroad, the Germans have concentrated on the domestic market. Generally this group requires more details on travel. It is also important to provide quality and comfortable accommodation and detailed information on the location. It is important to note that this market is itself fragmented; some travellers may wish to pursue leisure activities such as bowls or swimming while others may prefer passive entertainment such as guided tours and shows. Similarly, while the majority prefer visiting one country area in depth others prefer a classic tour. This group is price sensitive and likely to travel during the winter period to avail of cheaper prices and to avoid congestion.

The market for holidays for the disabled is also important as there are an estimated 50 mn people in the EC with some form of handicap. This group also has a preference for off-season holidays and is generally price conscious. Steady growth in holiday-taking by the handicapped is expected in the 1990s.

Other Market Segments

People's propensity to travel is also related to their income and socio-economic group. If one considers the family life cycle it is clear that households with children over the age of six are more likely to travel than those with younger children, whilst households with no dependent children are even more likely to travel. Similarly, households with no dependent children are less constrained by factors such as school holiday periods and can more readily travel in the shoulder and off-season. The previously discussed 55+ segment fits into this category, but there are other segments such as "empty nesters" (couples, aged 45-55, whose children have grown up and recently left the household) and a variety of pre-marriage "lifestyle" market segments.

SEASONAL SPREAD OF OUTGOING TRIPS



Source: ETDC

Markets can also be segmented in relation to special interests with targeting through clubs, associations and other affinity groups. Special interest weekends and getaway breaks are being increasingly used to spread demand into the off-season. Hobbyists and other enthusiasts are generally willing to travel in the off-peak on package vacations involving their favourite pursuits. Marketing such breaks is generally best achieved through identifying specific target groups, such as clubs or societies, and using direct marketing techniques such as face-to-face presentations, mail shots or advertising in specialist magazines.

With the rapid growth in short-break holidays over the last decade special-interest holidays have increasingly featured in the off-season activities of hotels and resorts. Where whole resorts are involved in themed or special interest breaks, the borderline with special events/festivals becomes blurred. For example, in the UK the declining industrial town of Bradford (as well as promoting industrial heritage tours of former and existing clothing factories) makes use of its substantial ethnic Indian population and promotes special breaks based on Indian culture and heritage, particularly Indian food. This is supplemented by its location close to the home of the Brontë sisters, which attracts both general and specialist literature enthusiasts. On a broader scale, national tourist authorities have also focused on special interest holidays, promoting gourmet food and wine attractions, genealogy, art, etc.

SPECIAL INTEREST HOTEL BREAKS

Hotels have shown particular interest in special interest groups for filling trough periods. The Hotel Norwich, for example, employed a specialist advisor and included weekends on subjects as varied as Ghosts and the Macabre, Vintage Cars, Norfolk's industrial heritage, and Ancient Churches of Norfolk. The hotel also established and mailed out details of a Special Interest Helpline, challenging people to come up with an idea they couldn't offer, and used direct mail to access special interest associations. A key point is making friends with journalists and the possibilities for widespread promotion through press features and to encourage repeat business. Another key point which emerges from the experience of the Hotel Norwich and other operators is the importance of targeting. A specialist "ideas" consultant used by the ETB lists a number of different points to consider when exploiting the enthusiast market, including:

- audit local heritage cultural, scenic and historic - and locate the specialist strengths of the area. Within a radius of say 20 or 30 miles, what points of interest can be linked together to create a programme that stands up to scrutiny and is of genuine appeal?;

- assess the practicalities of packaging the topic concerned. How big is the potential market and will it have mass appeal, or be a minority interest? Are there seasonal constraints?;

- research the market, talk to local experts in the chosen subjects, assess the strength of the overall package's appeal. Talk to the national organisation for the subject concerned and inquire about overall membership for the specialist association, what kinds of people (ie spending power, demographics, propensity to travel) are they? What competition exists? How do they rate the potential lure of your proposed programme?;

- add a special ingredient to your suggested programme, ideally an item which people can't book or do themselves - a private behind-the-scenes tour of a castle or collection, or a chance to listen to an expert in the field. Another finesse is to secure third party endorsement for the programme. This adds status and credibility to the package, and imbues it with an advantage which is genuine added value;

- how should the special interest package be promoted? The first decision is whether to go for groups or individuals. With groups in mind, a trick is to invite the secretary of a national organisation to sample the proposed package as your guest, or target coach operators who may be willing, based on the incentive of the keen net price being offered, to go out and market the package to prospective clients. More and more travel agents, especially independents, are also in the market to promote party travel;

- one approach for attracting individuals is to buy into/get into a tour operator's programme. Another tactic is to offer the package to hotel guests, on a DIY basis, with a welcome pack of detailed notes, free admission to appropriate attractions, and possibly a suitably themed menu. The advantage of this method is that there are very few up-front costs, and above all, there is no need to set specific dates and incur specific charges only to attract a small response. The downside is that this approach is unlikely to attract people when they are most wanted out of season! A set date strategy is higher risk - bedrooms are booked in anticipation, guest speakers contracted, privilege visits arranged, and so on. This approach can be successful, but may need a multifaceted campaign....press releases to travel writers... advertising in enthusiasts' media... purchasing mailing lists... mailings to past hotel clients... and so on. A costly strategy, but potentially worthwhile if the hotelier or operator seeks to build a national reputation in this particular area;

- destinations may employ a mix of these methods and add others such as a themed week (perhaps annually) or month (or year!) as a platform for the selected specialist subject. Local hoteliers, attractions and operators are encouraged to support the theme with their own packages, promotions and costumed welcome, plus food or drink-related events. Associated press relations activity generally provides a promotional bonus for many suppliers. Journalists are often very keen to feature such unusual or minority interest products, and the result is an enhanced awareness, both of the venue and the locale.

The commitment of the supplier to the special interest concerned is often a key success factor. Perhaps if it is a personal preference or pastime of the hotelier (eg. food, fine arts or fly fishing) the keenness will be all encompassing, and the aim will be to make the idea work, however long it takes. In other cases, all too frequently, the operator loses heart after a few small campaigns bringing only low returns, wasting the preparatory work. The ideal is to set a budget, choose an appropriate mix of tactics, take full PR advantage from the idea and generally build a niche market which is of long term value.

The Dutch Ministry of Economic Affairs (in the report *Improving Seasonal Spread of Tourism*) segments clientele for off-season tourism on the basis of their desire to take off-season holidays (want) and their ability to do so (can). Of the four resultant segments the interests of commercial tourism suppliers should be directed at the two "can" segments, while governments should mainly direct their attentions at moving tourists from the "can't" segments into the "can", particularly the "can't but want" segment. Government policies count in this regard, such as staggering school holidays and social tourism schemes, while the promotional and other activities (such as investment incentives) of national tourism authorities can also, of course, aid commercial organisations in attracting off-season tourists. These issues are discussed in Chapter 7.

Segmentation of Off-season Tourism Demand

	"WANT"	"DON'T WANT"
"CAN"	Segment I Can and want	Segment II Can but don't want
"CAN'T"	Segment III Can't but want	Segment IV Can't and don't want

Source: Ministerie van Economische Zaken, The Netherlands

Conclusions

The role of commercial tourism organisations in spreading tourism arrivals into the off-season lies mainly in developing attractive packages and targeting them at the "can" segments. Ideally, their strategies should maximise the proportion of "can and want" holiday-makers taking trips in the shoulder and off peak months, while altering the preferences of some of the "don't want" segments. Most of the component groupings of the "can" market segment have been discussed above; the following two chapters discuss product and other strategies which can be used to attract shoulder and off-season tourists.

4 Off-Season Tourism Products

All-Weather Facilities

All-weather facilities developed for tourism purposes can vary from a health and leisure centre added to a hotel, to indoor resort concepts such as Center Parcs in France and Benelux, to indoor water-activity resorts such as the Sandcastle Centre in the UK. All three types of facility are becoming increasingly common within the EC, although the scale of investment required for the latter two is a major constraining factor. With the growth of second holidays and short-breaks over the last decade, however, investment in all-weather facilities in Northern Europe has become more profitable and hence more widespread. Most hotels catering for winter-breaks now have indoor leisure facilities of some kind, while Center Parcs have developed a successful all-season product based on an indoor resort concept (see panel).

The popularity of many theme parks has been waning in some Member States, while their ability to generate profits is often hampered by the weather and seasonal demand. As a result many are now incorporating covered attractions with Euro Disney, which will open all year, being an outstanding example. Changing demographics are also likely to see a re-orientation of attractions towards more family-based attractions and those with educational, scientific and cultural/historical themes.

Health and Sports Tourism

Spa and health resorts, particularly those with indoor facilities, are key products for promoting off-peak season tourism. The health tourism sector's recent growth performance has varied widely among Member States, generally influenced by factors such as tradition and the value placed on the medicinal qualities of spa treatments. At present the industry is particularly strong in Germany, France and Italy. The opening up of Eastern Europe resorts, however, will increase competition for clients in the medium term. On the other hand, the possibility of harmonisation of social security systems within the EC may allow reimbursement in one Member State for treatment received in another

CENTER PARCS

Using careful targeting, continuous product development based on consumer market research and differential pricing Center Parcs have become one of the best known exponents of all-season tourism - occupancy levels exceeded 90 per cent in all of their resorts during each month of 1990. The essential facilities of Center Parcs' resorts have remained constant over the last 25 years:

i high quality, carefully designed villas laid out in such a way that each has a high degree of privacy and a view over woodland or water;
ii a rural setting consisting of woodland, water and open space;
iii a variety of retail outlets and themed restaurants with visitor choice between self-catering and eating out;
iv provision of an extensive range of active and passive leisure facilities, both indoors and outdoors.

However, continuous product development has been a hallmark of Center Parcs' success - most notably water-activities enclosed in a sub-tropical dome in the 1970s, which were linked to indoor landscaped villages in the 1980s. The resultant concept is that within easy reach of the wintry streets of northern European cities one can relax around a swimming pool beneath tropical palms and be within a short stroll of a fashionable shopping mall, restaurants and comfortable accommodation. The importance of Center Parc type resorts in combatting seasonality is magnified because their primary target group, families with small children, differs from those which are normally associated with off-season tourism. They have a number of secondary target groups:

- demographic trends point towards smaller family units and they are gearing towards these;
- they also aim towards peer groups such as squash clubs etc.;
- they offer reductions for senior citizens who help to bring the rest of the family along with them;
- businesses and conferences is a smaller division, with two parcs geared towards this market.

In the Netherlands, Center Parcs mainly targets the mass market; however in the UK the targeted population is more up-market and with even more emphasis on the short breaks market. Center Parcs do not have weekday troughs of any sort because of the way they structure their breaks, mid-weeks (Mon-Thurs) and weekends (Fri-Sun). Center Parcs occupancy rates have remained high, averaging 96 per cent throughout 1985-90 (they generally have to turn away trade at certain periods of the year) with expansion coming from higher capacity and more spending in the Center Parcs on the ancillaries provided. Occupancy is presently lowest, albeit well above 90 per cent in most of the Benelux properties, in the mid-April to mid-June period when there are no school vacations and in the first few weeks of December. The relevance of school vacations to demand is apparent from occupancy rates across the different properties - for example those nearest the German border are fully occupied when the neighbouring German provinces are on school vacations. Similarly in July and August, despite the all-weather nature of the product, all Parcs are filled to capacity. These troughs are reflected in pricing patterns - a week in early December is half the price of the same holiday in early August, while special offers outside normal patterns are available in May.

EC Member State. This will boost the attractiveness of resorts in the warmer climates of Spain and Portugal but may also lead to an increase in overall demand. Other positive factors influencing the future prospects for health-based tourism include:

* increasing awareness of health issues and trends towards healthier lifestyles;
* spa's clientele is traditionally drawn from the 40+ age group and the on-going shifts in European age-structures favour further growth;
* increasing acceptance of the value of alternative and of preventative medicines.

Winter sports may help to generate off-season business for summer resorts, although these sports can generate their own seasonality problems. Almost all the revenues for ski resorts in the northern hemisphere are generated between December and March/April, with as much as 40 per cent in the month of February alone. The Scottish Highlands provide a good example of how ski-ing, fishing and shooting have been utilised to boost off-season business in an area which traditionally relied on summer tourism (see panel). However ski-ing and snow based sports, and some other winter sports such as shooting and fishing, arouse significant environmental concerns.

Holidays with an activity or sports content are becoming increasingly popular as a mechanism for spreading arrivals into the off-season. Nautical sports are useful for extending the season in the southern Member States, but are less attractive in the off-season. Despite being an outdoor activity, golfing holidays are marketed in the off-season and have been heavily promoted in Spain and Portugal, and to a lesser extent in Scotland and Ireland. Portugal has been particularly to the forefront in marketing a range of sports holidays, using the marketing slogan of "Sportugal". While golf and tennis holidays have the highest profile, Portugal has also developed deep-sea fishing, hiking, horse riding, hunting and shooting and training for sports teams as off-season attractions.

WINTER SPORTS IN SCOTLAND

Winter sports activities such as ski-ing, shooting and fishing are themselves seasonal, but this aspect is a bonus to areas such as the Scottish Highlands which have an independent summer season. Although ski-ing holidays increased in popularity during the last fifteen years, the Scottish Highlands are still well removed from being an international ski-ing destination. Nevertheless, ski-ing is important in the provision of a longer season for hotels, particularly for the non-day-trip resorts of Cairngorm and Aonach Mor, and to a more limited extent at Glenshee. The Scottish ski-ing market is estimated to be 50-60,000 regular skiers.
Ski-ing, however, is only one of a number of winter sports which has received substantial attention in Scotland in order to boost tourism in the off-season. Others include shooting and fishing. Scotland is recognised as offering some of the world's finest game fishing. The rivers Tay, Spey, Dee, Don, Deveron and Tweed are famous for trout and salmon, whilst the North West waters and lochs are considered best for sea trout. A recent survey estimated that salmon fishing and netting was worth £53 mn to the Scottish economy, all of it generated during off-peak and shoulder months. The Scottish close season for trout is from early October until mid-February, while the close season for salmon fishing in Scotland varies according to the area but extends roughly from the end of September to the end of January. The average length of stay by participants of fishing holidays was 9.5 days. This is significantly higher than the average of about 5.5 days for all holiday trips in Scotland. As part of a further initiative to promote non-peak season tourism the Scottish Tourist Board is about to launch a Scottish Spring Trout Festival, commencing in 1992. Game shooting is not solely confined to the off-peak months. However, covering August to February depending on the game being shot, it does contribute strongly to off-season tourism earnings, contributing an estimated £29 mn in 1988-89.

The prospects for growth in sports-oriented holidays, both long and short-break, are relatively good. Some of the factors underlying this optimism include:

* there has been a significant increase in awareness of health issues and of the importance of regular exercise, and this awareness will continue to exert a strong influence on general leisure and holiday patterns;
* packages including mildly exerting activities are being increasingly sought by empty nesters and other tourists in the expanding 45-65 age bracket;
* trends towards later marriages have already boosted demand for activity holidays and will continue to do so.

Culture, Heritage and Special Events

Cultural and heritage tourism includes a wide variety of tourism products from archaeological sites to genealogy to historic trails. The development of cultural tourism has many advantages which distinguish it from other forms of tourism, including its educational value, associated development/preservation of cultural resources, regeneration of run-down areas and broadening the tourism season. In the latter respect, culture/heritage attractions are important both because they are weather-independent and because a substantial proportion of the tourists they attract are willing and able to travel in the off-season, particularly senior citizens and long-haul tourists. Other traditional markets for culture and heritage products are:

- the middle class and better educated;
- people with above average disposable incomes;
- families with young children and empty nesters;
- people whose leisure opportunities are educationally motivated;
- people with young children, for whom an educational experience is a fundamental part of their reason to visit.

The prospects are for increased demand for cultural tourism boosted by factors such as higher educational standards, greater interest in other European cultures as EC integration proceeds and the growing popularity of short breaks. An EC-funded survey of National Tourism Organisations in 1988 indicated that painting, architecture and crafts offered the greatest potential for increasing international tourism in the EC.

Co-operation in marketing cultural attractions is generally important as few of the smaller cultural products have either sufficient drawing power to attract visitors independently or the resources for substantial promotional campaigns. Interpretive centres, re-enactments and other events can also be used to boost interest and to encourage repeat visits. Rapid recent growth in short-break holidays is reflected in festivals and events centred on cultural and heritage events. The role of events lies not just in attracting tourists to an area, but also in catering to tourists in particular destinations who are there on a general holiday. However, in the context of re-distributing arrivals into the off-season (or other substantial trough periods) events generally need to be large enough to attract tourists in their own right. This is also true of events in the shoulder season, although to a lesser extent. In that case their importance may also lie in enhancing the overall attractiveness of the destination and the satisfaction of visitor holidays in the shoulder season. There are, however, numerous examples of events deliberately created to extend the summer season. Event tourism plays an important role in urban re-generation and in regional development schemes, a context in which they are also useful in spreading peak tourist flows to lesser-visited regions. In Heidelberg, special events based on the city's musical heritage have been utilised to boost tourism arrivals in trough periods, while on a much larger scale Spain intends to use the 1992 Olympics (in Barcelona) and the 1992 World Expo (in Seville) to alter Spain's tourism image and its growth potential.

A major problem with cultural tourism is that in the peak season many cultural and heritage sites are over-visited and create problems both of congestion, and, more seriously, potential damage to the resources themselves. Additionally the potential for developing cultural tourism in the off-season is often hampered by the closure of many attractions, particularly those whose management is outside the control of tourism-oriented bodies.

5 Other Strategies for Improving Seasonal Spread

Holiday Periods

All EC Member States have three main school holiday periods, Christmas and the New Year, Easter and Summer, with the bulk of their holidays occurring during the summer season. An estimated 53 per cent of families in the EC are tied to school holidays for family vacationing.

A number of Member States have successfully spread holiday-taking over a longer period by staggering holiday start and end dates. Experiences in the Netherlands and Germany highlight the benefits of this. There is still scope for other European countries to follow this example and implement a system that spreads school holidays, if only to prevent the start and finish dates coinciding. The UK has increased the scope for spreading short-break holidays at other times of the year by allowing discretion over the taking of a specified number of vacation days during the school year.

SCHOOL HOLIDAYS IN THE NETHERLANDS

The Netherlands is one of the best examples of how strategies affecting the timing and distribution of holidays can help to reduce the seasonal peak. In 1975 the Netherlands was divided into three regions, in order to implement a staggered school summer holiday programme. Initially the six week long summer holidays for kindergarten and primary schools were spread over eight weeks in yearly rotation. Thus, each region started and finished its holiday period at different times. In 1978 the staggering of secondary education summer holidays was established on the same principle. So far holiday distribution in the Netherlands has concentrated on the summer period. Other vacation periods were not taken into consideration because the main emphasis was directed at making the optimum use of limited capacity in the high season.

The staggering of holidays has had a significant impact on domestic holidays and short stays. In the early 1980s nearly two-thirds of holidays were being taken during June, July and August, while by 1989 this had fallen to just 46 per cent. This proportionate change does not necessarily reflect the absolute change since the number of holidays taken increased from 10 mn to 15.5 mn over the same period.

While few Member States have introduced policies in relation to work holiday dates, on-going business pressures are leading to greater flexibility and greater capital-intensity in manufacturing has led to fewer complete holiday shutdowns. In many service industries the holiday periods are spread to the extent that employees at a similar position have to ensure that there is sufficient cover when they are on holiday. While one employee is on vacation another one must work and vice versa. Historically trade unions had a great influence on the length and timing of holidays. The shift towards service industries and more flexible working agreements has meant that workers still tend to have a summer holiday but with a greater spread, with some having two weeks in June and others three weeks in August.

Sharp peaks within the high-season months may occur at week-ends and in particular those which coincide with the traditional start and end points for institutionally determined holiday-periods, eg the August bank holiday in France traditionally marks the end of the summer holidays. Thus, there may be a case for varying the day of the week on which school holidays begin and end (and encouragement for workplaces to do likewise), but no such strategies have been executed in any Member States. In particular, the tradition for beginning and ending holidays at either end of a weekend may be difficult to alter. Similar isolated peaks occur as a result of public holidays in various countries. Staggering of public holidays within countries is not widespread, although in many Member States a minority of these holidays are staggered as a result of tradition or local religious festivals. There are business and economic reasons for harmonisation of the dates of public holidays within each Member State and a similar rationale may be applied to a Community-wide harmonisation of public holidays. However, the costs of harmonisation are likely to outweigh potential benefits at the present time.

Pricing, Promotion and Information

Discount pricing, information provision and promotion of off-peak holidays are crucial elements in moving vacations off-peak. Pricing has a critical role to play; if significant discounts are offered, then people may be persuaded to take their holidays earlier or later than they had planned in order to save money. Similarly, holidays that would be too expensive during the peak season may become affordable during the off-peak season, thus spreading demand away from the peak.

Any financial incentives, in terms of seasonally discounted travel accommodation or activities, must be promoted if they are to have an impact. The greater the awareness of special off-peak promotions the greater the impact of off-peak pricing and promotion. Pricing and promotion programmes will only have an effect if there is a high level of accessible information concerning them. Where promotional budgets are constrained, which is generally the case when discounted off-peak breaks are being offered, targeting can greatly improve marketing addition of special offers/incentives can greatly enhance a package's attractiveness. Such breaks are generally best promoted by concentrating on their content rather than describing them as off-season special offers - such terminology tends to convey negative images.

ON-LINE SYSTEMS

An increasingly affordable option for spreading information on seasonal price discounts is the inclusion of suppliers and their offer in on-line systems. Computer reservation systems (CRS's) have traditionally been most important in the airline industry but their use is becoming increasingly widespread. CRS provide information which enables potential tourists to see, choose and pay for their holidays. These systems are capable of allowing potential tourists to compare prices and see the price advantage of off-season visits compared to peak ones, but are not widely used for this purpose at present. The ability of CRS's to provide the consumer with a greater range of services and fares faster than ever before is likely to provide intermediaries (airlines, travel agents and hotels) with greater control of the market.

The on-going development and spreading of CRS should bring a number of significant benefits to the hotel and tourist industry. These systems will provide improved yield management techniques - maximising occupancy rates, and matching variations in demand on a seasonal and weekly basis to different pricing structures in order to maximise revenue. Use of new reservation technologies can help to set targets for the number of rooms that can be sold at a given set of prices at different times of the year or days of the week. Such parameters can be built into the system and can be used to manage capacity by influencing the decision to purchase at the point of sale, which may be abroad. Sell through techniques are part of this process. These are means whereby set criteria within the CRS can influence the nature of the bookings that a given hotel will accept. Bookings can be manipulated to correspond with seasonal fluctuations in demand; for example during peak periods the CRS can be instructed not to accept bookings for less than a full week. If rooms are let for a shorter period the hotel may be left with empty rooms. The system can also be instructed to charge different tariffs according to fluctuations in demand. A number of rooms may be promoted and let at a special discount rate either during the off-peak months or during the week, while supplementary or peak pricing may be used to maximise revenue during the peak periods. The CRS thus enables the industry to offer different packages at different times of the year. This is in effect a more sophisticated example of having summer and winter rates, since the rate can be changed on a daily basis and the capacity offered at any given time at a particular price can be strictly monitored.

CRS's can therefore be used to deal with the imbalance in demand by employing price variations. CRS's will not only help to pinpoint the location, number and types of accommodation available at any given time, they can also be used to counter the problem of late availability. Hotel rooms and flights are extremely perishable commodities; if the room or seat is not sold in advance then the hotel or airline will lose revenue. It is better to sell excess capacity at less than cost price, and gain a contribution towards costs rather than nothing at all. CRS's will enable travel agents, airlines and hotel chains to identify excess capacity at any given time, enabling them to evolve strategies to generate more revenue during off-peak periods. Business generated during off-peak periods is often discounted either by offering special rates or by creating an inclusive package. Once the actual cost of providing the service, either a room, a flight or an activity, has been calculated, any reservation potentially producing income above this figure benefits the operator and helps to spread demand.

During peak periods, timing of school and work vacations, tradition and the weather generally ensure that tourists come to the product suppliers and the importance of marketing and promotion strategies lies primarily in the allocation of this demand. In the trough months promotional strategies are often charged with the additional tasks of identifying who might be willing to take holidays in the off-season and then to convince them to take such a holiday.

The growing importance of second holidays and the short-break market has made both these tasks somewhat easier, but they have also increased the level of competition for these out-of season market segments so that packages to attract these tourists now often incorporate additional special features or eye-catching elements. Value is often added to these packages through the inclusion of free admission to local attractions, special meals, free cocktails, etc. and can be accomplished through a range of different methods. Ignoring the quality element of price/ quality mix is a frequent omission in holiday packages which emphasise price and compromise on quality aspects, often to the longer-term detriment of efforts to spread vacations into less fashionable times of the year.

The short breaks market is one of the fastest growing market segments. Increases in disposable income and extended leisure time have contributed to this growth and underpin favourable future prospects for such holidays. The spread of short breaks across the year is considerably better than longer vacations and they are already helping to spread capacity utilisation. The promotional and product development efforts of most tourism operators aiming at short-break holiday-makers are focused on the domestic market. While this is admirable, as it is domestic tourism which contributes most to seasonal peaking, international short breaks are also becoming increasingly important, in particular city breaks. Some of the EC's peripheral Member States such as Greece, Ireland and Portugal are particularly disadvantaged in competing for this market segment because of the distance involved and the cost of access transport (because transport makes up a bigger proportion of the package cost). Thus second holidayers often provide a better target market for these countries (see panel).

BORD FAILTE'S INTERNATIONAL PROMOTION STRATEGY

While the primary aim of Bord Failte (the Irish Tourist Board) is to increase numbers and the emphasis is on the volume achieved more than their distribution across the year, increasing numbers in the shoulder season is a key part of the strategy to increase international arrivals. There are four general, and occasionally overlapping, strands to Bord Failte's international promotional strategy for increasing international arrivals in the off-season:

i the timing of advertising, which is influenced by how much shoulder season business is being sought - for example advertising in February in certain markets will capture more potential holiday-makers likely to travel in the early shoulder season, while waiting until March or April may only capture those intending to travel in the peak season. Timing of decision-making will also depend, of course, on the source markets and on what type of holiday is being promoted - for example, Italian holiday-makers decide on vacations, destinations and timing nearer to the month of departure than the French or the English, while decisions regarding long-haul travel are taken even earlier;

ii the incentive travel market - marketing to the incentive travel trade differs from normal tourism marketing and has more similarities to sales of industrial products. Both large US incentive houses, such as EF McDonald and Maritz, are used, as well as direct approaches to corporate organisations. Important elements of marketing incentive holiday packages are the provision of high-grade promotional literature and the inclusion of special or unique selling points, such as playing on a world famous golf course, a special banquet in a historical setting, etc.;

iii targeting affinity groups - on the European market in particular, this segment is a key market for travelling outside the peak season. This market tends to be very price sensitive and travels preferably in April, May, early June and September. In common with most of the out-of-peak international travel markets targeted by Bord Failte, these tourists tend to take their main holiday in their own country and their travel with an affinity group is a second and shorter holiday (usually a week but it may be as short as 4 days). Affinity groups can include company social clubs, retirement associations, trade union groups, farmers' associations, etc. and the main market for Ireland tends to be France and to a lesser extent Germany, Benelux and Italy. Again the bulk of the marketing expense differs from the conventional mix, where print and media predominate, with the emphasis on locating groups interested in holidaying in Ireland, requiring "on-the-ground detective work";

iv targeting senior citizens - this segment is not, by nature, as price sensitive as the affinity groups. However, it tends to be more crowded and more competitive because a lot of organisations have recognised its potential for increasing business in the off-season and this has forced the prices which might be obtained downward. Thus, Ireland is often competing with very low-priced Mediterranean destinations with "friendlier" off-season climates - its main competitive selling point is the clean environment, tranquillity and security.

Considerable investment has taken place, helped by funding from the EC, in developing special interest and all-weather products in Ireland over the last five years and the range of products being promoted by Bord Failte has expanded considerably. Private expenditure on foreign marketing of these products has also grown, prompted by the conditions of the financial aid received. Special interest holidays are generally second, rather than main, holidays or short breaks. There may often be some overlap between marketing special interest holidays and targeting affinity groups. This market is very competitive and the key to attracting it is a mixture of product differentiation, effective promotion and pricing.

Social Tourism

In theory social tourism policies could be devised to help overcome the problems of seasonality and congestion by offering low-priced holidays off-season and in less-populated areas. In discussions the Belgian tourist authorities were of the opinion that such a development was not valid in Belgium, where the tourist facilities were constructed for use in warmer weather. In France social tourism holidays are sharply peaked in the summer season because that is the time of the year most suitable for many clients to take their vacations. Spreading school vacations would better enable the spreading of these holidays among under-privileged families with dependent children, while the Chèque-Vacances system could be used to improve the cost-attractiveness of off-season vacations.

Regional Spread

Spreading tourists more widely geographically within the peak season is another strategy for addressing the congestion problems associated with peaking of demand. Such a strategy involves the development and promotion of twin attractions. Where this spreading takes place within a small geographic region, the potential benefits are twofold:

* when an attraction is overcrowded in the peak period the development of alternative attractions will help to spread tourism and to relieve the burden on the main attractor;
* the new attraction being developed quite often has a head-start as there is a captive market for it already in the locality.

In Spain concentration on the attractions and tourism products of Mediterranean coastal areas led to deterioration of client satisfaction, and geographical spreading of tourists at a national level is now being utilised to maintain overall tourist arrivals.

Transport Strategies

Transport congestion, resulting from seasonal peaks, imposes a number of costs including operational inefficiencies and disruptions and delays to journeys. Passenger transport industries are characterised by marked hourly, daily, weekly and seasonal peaks and troughs of demand. Daily or weekly peaks are related to the pattern of working times and days during the week. The pattern and intensity of the peaks and troughs varies by route, geographical area and transport mode. The example of air travel indicates some of the associated costs: aircraft in Europe fly an estimated 8 per cent further than necessary while airport capacity is forecast to be constrained at eleven major European airports by 1995, and at sixteen by 2000. Measures have already been taken to to alleviate congestion problems in the air transport sector, particularly those related to air traffic control, but room for improvement remains. For example, the reduction of restrictions on night time flying would increase the air transport system's capacity, and exists for improving cooperation between the civil and military air traffic control authorities. Many regional airports remain under-utilised, even in the peak season. These airports could be developed to spread tourism arrivals and to cater for charter traffic. However, to achieve this requires greater commitment from the main carriers and tour operators.

Road vehicles are the most used form of holiday transport and road congestion is a major problem in the peak season. This is particularly the case on the routes to Mediterranean and Adriatic resorts - the main origin regions are located in central Europe and this outflow is supplemented by Scandinavians and cross-channel car-ferry traffic from the UK and Ireland. Better spreading of holiday-trips, including departure days as well as throughout the year will, of course, contribute to relieving road congestion. However, problems will remain. There is therefore room for improving links between transport organisations on issues such as developing and publishing alternative routes to holiday destinations and communicating information about potential bottlenecks.

TOP EIGHT REGIONS FOR OUTGOING CAR TRIPS IN THE EC, 1990

		All Trips (mn)	Car Trips (mn)
1	North Rhine/Westphalia	17	9.5
2	Bavaria	12	6.9
3	Baden-Württemburg	9	5.8
4	Flemish Belgium	12	5.7
5	N-W Germany (including West Berlin)	11	5.3
6	Central Germany (Hessen, Rhineland-Pfalz, Saarland)	9	5.2
7	West Netherlands	9	4.8
8	South Netherlands	4	2.5

Source: EDTC

In general, the Community's railways have spare capacity on most routes or additional capacity that can be made available at limited cost. At present rail is often uncompetitive relative to other modes of transport in terms of speed and service quality. There are also organisational and infra-structural barriers obstructing progress towards a more efficient Europe wide system: technical incompatibilities prevent trains from some Member States running over each other's systems, while railways' highly centralised structures have led to inflexibility and rigidity in relation to commercial developments and have assisted government intervention. For a single European rail system to meet its potential substantial infra-structural investment is required. It is also essential that there is a strengthening of co-operation and collaboration between the railways in different Member States so that they can present themselves on the international market as a single carrier. This is likely to require a simplification and clarification of the role of the State and may require greater autonomy for railways to enable them to respond to market requirements.

6 Seasonality Policies at a National Level

Promotion and Marketing

Seasonal peaking of demand varies considerably across EC Member States. The importance attached to flattening the seasonal profile by national tourist organisations (NTOs) also differs greatly. No Member State accords first priority in tourism policy to reducing seasonality. The main aim of the tourism promotion agency in every Member State is to maximise tourism revenue. In most States, encouraging tourists to visit in the off-season is of primary concern insofar as it contributes to revenue maximisation objectives, although some fear that promoting off-season vacations may adversely affect peak season revenues. However, the 1980s saw increased interest in off-season tourism as a result of increased demand for off-season vacations and greater concern about the adverse effects of seasonal peaking. Alongside this, many non-traditional tourism regions began to take an increasing interest in developing tourism products, generally non-beach products capable of utilisation throughout the year.

When analysing the activities of NTOs, it is generally important to distinguish between their policy towards domestic tourism and that towards international tourism. The objective of maximising revenues is most apparent with respect to attracting international visitors, with the southern Member States tending to show relatively more concern about spreading arrivals into the off-peak months of the year. Alongside the changes in tourism demand already mentioned, the trend away from beach-based holidays has further encouraged the southern States to develop alternative products, while the deteriorating quality of many of the "mass tourism" resorts has also stimulated the development of new and different types of destination. National tourism agencies can also play a broad promotional role in stimulating domestic-based shoulder or off-peak holiday-taking and in dispelling negative images of such holidays ("only for the elderly", "resorts are dead" etc.). Such a campaign is already undertaken in the Netherlands, in conjunction with the staggering of school holidays.

The national tourism agencies of all Member States are familiar with the target market segments for off-season tourism and their holiday preferences. All have active strategies for promoting their country's off-season tourism product. The emphasis placed on marketing for the off-season varies according to available funding and its importance relative to other promotional objectives.

How best to operate within these contraints is a decision which is best reached by the relevant authorities in each Member State.

Staggering of School Holidays

In some Member States little is done by NTOs to influence the timing and/or destination choice of domestic tourists, although it is these holiday-makers which contribute most to seasonal peaking of demand in nearly all Member States. Where NTOs have taken measures to influence the holiday-taking decisions of domestic tourists they have been primarily aimed at those whose holiday timing decisions are constrained by institutional factors or by the availability of finance.

The timing of school holidays has been the major institutional factor constraining the seasonal spreading of holidays. Effective and deliberate staggering of school holidays has taken place in three Member States, the Netherlands, Germany and France - although in France summer holidays, the most important in this context, have not been staggered. In all three cases the policy has been successful in reducing congestion problems and spreading the tourism industry over a longer period.

In the context of staggering school holidays other considerations are the need for medium term planning (scheduling should be over at least three years) and varying the days of commencement and ending of holiday periods. While staggering summer holidays is the most important element of any overall policy to introduce greater flexibility into the school holiday system, the timing of public and other school holidays is also important. Examples are as follows:

- in France where the popularity of winter ski-ing holidays among domestic tourists leads to substantial "peaking" problems, staggering winter holidays is important. These "ski-ing" holidays are also staggered in Scandinavian countries;
- in the UK, discretion for parents to choose ten days off for their children within the school year allows families with school children more flexibility and has probably led to a more even seasonal spread of short-breaks and second holidays.

The number of days/hours of attendance required at all levels of the school system vary widely across the EC, as does the length of the summer holidays, six weeks in some countries and up to three months in others. Reducing the length of summer holidays and re-allocating these free days to the winter period is one option for countries with long summer school holidays[1], although tradition and/or popular preferences may militate against such policies.

The spreading of domestic holiday-taking into off-season periods and of summer holidays across the shoulder periods is most evident in those countries where school holidays are staggered or where other flexibilities are introduced into the system. The tradition of long summer holidays, initially developed to enable children to help with the harvest and more recently cherished because it allows family holidays when weather conditions are most favourable, is not easily altered nor is it necessarily desirable to alter it. However, in those countries where summer holidays are longer than two months, shortening their length and staggering them over a longer period may be desirable. The relevance of this varies across Member States. For example, it has no relevance in Germany where both conditions are fulfilled and little relevance in Luxembourg where the geographical area and school population are relatively small (for these countries the importance of co-operation in any efforts to stagger holidays across the EC is of more relevance). It has, we believe, greater significance in southern European countries such as Spain and Italy, where domestic holiday-taking is sharply peaked and is increasing rapidly. There may also be educational reasons for re-examining the structure of school holidays. In some Member States a four-term school year is been investigated not on the basis of spreading vacation patterns but because more frequent holiday periods are thought to improve educational performance.

Peak season congestion on many routes and at the top holiday destinations is not simply a result of school holiday patterns in the individual country concerned. It also occurs because of the coincidence of the timing of holidays across Europe - co-ordination of school holiday staggering across European countries is considered in chapter 7.

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[1] One variation of this is a four-term system, while another would be to take days off the summer holiday period and to allow greater parental discretion á la the UK.

Staggering of Work Holidays

Over the last three decades there have been substantial changes in the structure of work holidays within Member States. As manufacturing industry became more capital intensive and service industries more important, the phenomenon of mass closures of businesses during the months of July and/or August has become less common. Nevertheless, work holiday patterns continue to constrain flexibility, with substantial variations across different sectors of the economy and across Member States. Thus, some people who would prefer to take their main holiday out of season may be restricted to summer holidays, while others who might consider out-of-season holiday alternatives if they were aware of the benefits (particularly price) may never investigate the possibilities if they have little flexibility for holidaying outside the summer months.

There are various options for addressing this issue, although most countries have tended to take a *laissez faire* approach (mindful of the trend in recent decades). In France the authorities have acted to speed this trend by issuing guidelines to businesses on remaining open continuously and how best to introduce more flexible work holidays. In the Netherlands the fixed summer holiday period for the construction industry was abolished. The French approach is largely based on progressively influencing the attitudes of employers towards work holidays and is mindful of the connection between big employers and smaller supply contractors - in the I'lle de France region (which includes Paris) a special body, the CATRAL, maintains regular contact with industry to effect these attitudinal changes. Similarly, other countries could consider the benefits of targeting "advisory" information of this nature at employers. While many governments would be loath to advise private sector employers on work holiday arrangements, one option would be to take the lead themselves by spreading work holidays by government employees.

Public holiday dates also lead to "mini-peaks" in demand out-of-season, particularly for short-breaks. However the interests of the wider economy are likely to preclude extensive staggering of public holidays within Member States, although this may be a worthy research topic.

Other Policies for Spreading Domestic Tourism

In those countries where social tourism is already an important part of the industry or where measures to assist holiday-taking among the old, the disabled and the under-privileged are being discussed, spreading the seasonality of these holidays should be considered. A substantial proportion of those being targeted under social tourism programmes are likely to be neither willing nor able to holiday outside the peak season, although some of the other policies outlined in this chapter could be used to alter these preferences and constraints. Nevertheless in countries such as France and Belgium, account has been taken of this reality and some social tourism buildings are low-investment/cost summer use buildings. Utilisation of those establishments suitable for winter use could, however, be boosted using price and other incentives for off-season stays. Another mechanism through which social tourism target groups can be encouraged to holiday off-season is through the issuing of vouchers which are redeemable only in the off-season or which buy considerably more tourism services during the trough periods of the year.

Tradition has been identified as an important determinant of the choice of the summer months for holidays and as a factor over which governments have little control. However, this tradition is being slowly eroded as workers have acquired additional free-time in which to take holidays and as the range and quality of off-season holiday products has improved. Furthermore, there is scope for tourism authorities to improve the awareness among consumers of the advantages and availability of off-season holidays. In the Netherlands, information campaigns pointing out these advantages have been undertaken for a number of years. Pre-supposing that school holiday arrangements are facilitating out-of-season holidays, one important medium for communicating this messages is through schools, not only because this is an effective channel for reaching a market segment which traditionally concentrates on peak periods, but also because it may help to erode the tradition towards summer holidays of the next generation of decision-makers (and to help dispel the negative image often associated with off-season holidays).

Policies Directed towards the Commercial Sector

The commercial sector has the most important role to play in improving the seasonal spread of tourism. It plays a central role in identifying target groups able to holiday in the less popular times of the year, developing suitable low-season products and putting together and promoting attractive holiday packages. There are many commercial success stories, some outlined in this report, of all-season tourism suppliers, but more can be achieved. Public policy can be marshalled, using a variety of mechanisms, to encourage commercial operators to improve seasonal spread. These mechanisms include:

* providing incentives for the development of off-season products;
* marketing subsidies for all-season products or for all-season client markets;
* providing information to operators on products, potential off-season clientele groups or on promotional strategies;
* co-ordinating co-operation across tourism sub-sectors to facilitate the development and marketing of attractive off-season packages;
* encouraging attractions and other tourism products to remain open during the shoulder and off-season.

Many Member State governments provide incentives for the development and marketing of off-season products, particularly in the peripheral/disadvantaged areas in Greece, Ireland, Portugal and Spain where European Regional Development Fund finance is being availed of. In general, we would argue that the decision to develop privately-owned tourism products is a commercial decision which should not be facilitated by State or EC funds unless there are other social objectives involved, such as regional development, urban regeneration etc. Where such grant-aid is provided we would argue that it should be targeted only at products with the capacity to generate tourism business on a year-round basis. Similarly, where governments provide aid towards the marketing of tourism products, such aid could be concentrated on marketing for shoulder season and off-season arrivals - Denmark for example has shifted its marketing grants so that they only apply to the off-season.

Government agencies can also play a useful role in providing information to tourism suppliers and potential suppliers about what off-season markets and products have been successful and how these markets/products are best developed.

The best example of such a concerted information campaign appears to be that which took place in the UK in the late 1980s: elements of this campaign included publication of two booklets containing case-studies of successful off-peak marketing; production of a quarterly magazine on off-peak operations; and access to a specialist "ideas" consultant to help operators to develop off-season product and marketing concepts. Similarly, as discussed in the following chapter, there may be scope for the EC to establish a framework for the dissemination of information.

National and regional tourism agencies can, and many do, play a useful role in co-ordinating the development and marketing of off-season "packages" between and across different tourism sectors. These agencies may help to improve holiday packages by shifting some of the emphasis from "negotiation" to "co-operation" -overemphasis on negotiation stances may lead to more cheaply priced, but lower-quality, packages which improve short-term results but reduce the prospects of repeat off-season business. The degree and form of involvement can vary from organising meetings between different sections of the tourist trade to developing mutual familiarisation with each other's products, to canvassing operators for prices and producing off-season holiday brochures. A problem with organising many off-season packages is that many attractions close in these months, but an example of a useful UK initiative is the production of a brochure for the trade stating which attractions stay open (this has the additional feature of encouraging longer opening periods).

Ameliorating Seasonality Problems

While there is considerable scope for improving its spread, the nature of tourism is such that seasonality will always be present. Accepting this fact, policies to ameliorate the problems this causes during the peak season should accompany policies aimed at spreading holidays throughout the year. Such policies include:

* improving the spatial spread of tourists by encouraging them to visit lesser known regions;
* improving visitor management techniques;
* improving tourist information on alternative transport routes;
* encouraging usage by tourists of under-utilised and less congested transport modes.

Spreading tourist arrivals across a wider geographic area has been recognised by many national and regional tourism authorities as an important strategy for ameliorating the problems of congestion in peak periods and as an instrument in regional development. Spreading tourism arrivals geographically has also been aided by the development of alternative forms of tourism, particularly rural-based holidays and cultural tourism itineraries. Policies in relation to different regions within a country (and different areas within a region) are often politically complex. In some Member States, the national tourism promotion agencies are obliged to give equal coverage to all regions in international marketing. Decisions on such matters are best formed at a devolved level and this report has no recommendations for national organisations on encouraging geographical spreading, except to flag its usefulness.

Congestion in peak periods can occur at resorts and at attractions, both public and privately owned. Visitor management techniques are generally better developed in northern European Member States. While municipal and local authorities are generally the agencies charged with managing visitor traffic flows (pedestrian and vehicle), national agencies can play a role through the provision of funding and by the provision of advice/information on practices elsewhere. The improvement of visitor management techniques and the wider dissemination of information on "best practice" is an issue which could be tackled on a pan-European framework.

Road traffic routes are most susceptible to high season congestion. Much is already being done, mainly by auto-clubs and touring organisations, to keep travellers abreast of bottlenecks and developing traffic jams. However, more could be done to develop and publicise alternative routings which could take some of the pressure off the main thoroughfares. There is also scope for greater international co-ordination on this issue. Similarly, congestion at main airports and regional spreading of tourist arrivals may both be ameliorated by the development of secondary and regional airports.

The concept of discounts for travel services, particularly bus and rail, for elderly and young people is well established and the Member States could encourage more sophisticated pricing policies whereby greater discounts are available in the off-season. Similarly, segmenting the market according to the season or time of week or day of travel is likely to result in greater spread of travel times. Decisions on these matters should, however, be commercially based.

There remains much scope for shifting holiday traffic from often congested modes such as air and private vehicle to public passenger transport, particularly rail, but in some Member States where rail transport is predominantly State-owned traditional management techniques, confused by unclear government objectives, have stunted the development of rail transport despite substantial State subsidies. We would recommend that the role of the State in railway transport companies be clarified and any subsidies provided rearranged to reflect the State's objectives and to allow the management of railways to develop as it would in other commercial companies.

7 A Strategy for the European Community

Introduction

The role for the European Community in tourism policy is mainly seen as an advisory and co-ordinating one. The Community authorities also have an opportunity through their broader regional development role to direct investment towards certain areas and types of development. The EC is already party to a number of initiatives and policies which are contributing to on-going improvements in the seasonal spreading of tourism arrivals.

The growing importance of international tourism flows, and associated congestion problems both en-route and at destinations, indicate the increasing need for international co-operation to combat tourism seasonality. A 1991 conference on seasonality in the Netherlands, co-funded by the Commission, recommended the establishment of an international framework to exchange information and monitor the activities of governments and the tourism industry. Such a forum could serve as a conduit for the exchange of information on "best practice", relating to issues such as spreading domestic holidays and on ameliorating seasonality problems within countries. It could also provide a framework for international discussions on cross-border issues such as traffic management and staggering school holidays. Any international forum on seasonality and European tourism should extend to the full European Economic Area (EEA), thereby including the European Free Trade Association (EFTA) countries. Routes through Switzerland and Austria are among the most congested in Europe in the peak season as north Europeans (including Scandinavians) travel south to Italy and the Adriatic.

Staggering of Holidays

A potential key role for the European Community is the encouragement of Member States to stagger school holidays, particularly during the summer months. The tourism authorities in many Member States recognise the importance of staggering school holidays for their industry, but the combined weight of other vested interests has stymied policy development and implementation. The Commission may be able to play a role in helping NTOs in those Member States whose governments have shown little interest in staggering holidays by providing information on the benefits of such a policy and the additional benefits of co-ordination across national boundaries. Similarly, and possibly in the same document, the Commission could provide information on the benefits of staggering work holidays.

At another level the Commission can play an important role in helping to co-ordinate such staggering between neighbouring Member States in the timing of these holidays. There is also a role for close co-operation with other EEA countries in this regard, particularly Austria and Switzerland (who jointly contributed nearly 10 mn trips into the EC in 1990 and are located within the central European core generating the bulk of European holiday trips).

Harmonisation of the number and timing of public holidays across EC Member States is an issue which is likely to be considered as part of the closer integration of the economies of EC Member States in the Single Market. Such harmonisation would facilitate a substantial number of enterprises conducting business across EC national boundaries. On the other hand, harmonisation of public holidays would considerably increase the problems of tourism seasonality, with associated problems of congestion of transport networks, resorts, etc. At this stage of integrating the economies of Member States, it is likely that the economic benefits to business of harmonising public holidays across the EC are out-weighed by the costs imposed through additional concentration of holiday-taking. Thus, in the medium term, staggering of public holidays across EC countries appears to be the better alternative, although analysis of the benefits and costs of harmonisation requires further research.

Product Development and Promotion

The EC Tourism Unit already researches, encourages and provides finance for the development of cultural and heritage products in the Community. The European Commission also provides finance for the development and marketing of a wider range of all-season tourist products through the ERDF. Another important role which the Commission already plays is in the co-ordination of the development of trans-national cultural/heritage products. Pilot schemes testing innovative ideas have also been funded.

In addition to contributing to a greater spread of holiday-taking across the seasons, these developments have helped to spread tourism flows into lesser-visited tourism areas and it is recommended that such financing be continued through the rest of the 1990s. Additionally, the development of the EC's poorer regions is aimed at raising income levels in these regions, which will in turn raise the incidence of holiday-taking. In some peripheral areas the increased level of holiday trips will initially contribute to a sharper peaking of domestic tourism demand in the short-run, but should also increase international flows from the southern States to northern tourism destinations. In the medium term, the evolution of holiday-taking habits in the southern Member States should lead to a more even spread of both domestic and international tourism flows.

The primary promotional objective of all NTOs is the maximisation of tourism revenue. Greater seasonal spread is consistently ranked as a subsidiary or contributory aim. There may, however, be scope for the Commission to provide advice which would aid the development of pan-EC off-season holiday packages and aid off-season promotion of Europe. Promotion of Europe as a destination is carried out by the ETC, who also conducts research into the market segments which travel in the off-season such as senior citizens, Japanese travellers, etc. The European Commission may consider complementing the ETC work with their own research of off-season groups and promotion of off-season products. Alternatively it might consider providing support funds for other research agencies to carry out additional research and promotion of off-season products.

Information

There are information gaps about off-season tourism which the EC could help to fill. Part of any national or EC campaign to increase the incidence of off-season holiday-taking should take account of the information deficiencies on the demand side (potential clients unaware of the advantages of off-season vacations) and the supply side (un-imaginative, often price-dominated and low standard, packages, and insufficient knowledge about target market sizes, motivations and requirements).

There are a number of mechanisms through which the European Commission could help spread knowledge among suppliers. A European version of the UK's case-study booklets and/or *Operation Off-Peak* quarterly magazine supplemented by awards for noteworthy efforts is one option. The setting up of a documentation centre may help to spread information about techniques for tackling seasonality through Member States or alternative fora for information exchange between Member States could be developed. For example, the Community Action Programme[2] has already flagged that a European information system be set up on the related topic of visitor management techniques and the establishment of European prizes for the best cultural tourism products. Networks are already being formed between resorts facing similar problems, generally environmental, although often with a seasonal content such as a network on seaside resorts.

There may also be scope for the development of electronic listings of off-season products which make information on them more accessible to travel intermediaries and to the public. This is an area where the EC could fund some initial research or where it could support the continued development or extension of existing computer reservation systems (CRS's). The newly developed Irish CRS (Gulliver), supported by the DG16/13 STAR advanced telecommunications programme, may provide a model of such a system which caters effectively to the spreading of information on seasonal products and on small tourism suppliers. The EC might also consider assistance to the production of a hard copy guide to "Off-season Europe", along the lines of the European guide on "Accessible Europe" proposed in the *Community Action Programme to Assist Tourism.*

Other Policies

The EC has a central role to play in the development of Community transport policy. Community transport policy is a complex issue and the development of detailed recommendations on how it should evolve to counter the problems of seasonality while reflecting other important issues is beyond the scope of this report. However, analysis from a seasonality perspective would suggest the following broad considerations:

i) airline liberalisation may allow cheaper off-season tourism packages to be offered across all Member States;
ii) development of secondary and regional airports and of point-to-point services between these in order to take the pressure off the primary international hubs;

[2] Commission of the European *Communities Community Action Programme to Assist Tourism* April 1991, Brussels.

iii) improvement of Europe's ATC (air traffic control) system along lines such as those outlined in the Eurocontrol Common Medium Term Plan;
iv) better air utilisation through measures such as fewer restrictions on night-time flying and new arrangements with military air authorities in relation to peak-time flying periods;
v) shift in balance of expenditure on transport infra-structure to favour the development of high speed rail links;
vi) the facilitation of the development of a single European railway system and free access to all national networks for rail companies.

The EC has also been seeking to actively develop social tourism within the EC. Social tourism offers considerable scope for developing off-season tourism business. Examples of possible developments include vouchers redeemable across all Member States in off-peak periods, a rail card for the under-privileged or elderly redeemable across the EC with extra-large discounts in the off-season, etc.[3] An alternative where the EC might be willing to provide some financing is through networking vacations in the off-season for the old or under-privileged in different Member States[4]. The European Commission could provide a forum for discussion of such issues between Member States.

Research

A number of areas have been identified where the EC may be able to contribute to further flattening the seasonality curve. Some of these areas, particularly where actions to improve seasonal spread have implications elsewhere in the economy, require additional research. These areas include:

i) the feasibility of developing an electronic listing of off-season package holidays across the European Community which could be easily accessed by travel intermediaries and consumers;
ii) cost/benefit ratio of staggering public holidays across the European community;

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3 The Community Action Programme has already flagged that the link between social tourism and staggering of holidays, including seasonal tariffs, will be studied.

4 For example, discounted holidays in an Irish region could be provided for a Portuguese group and vice-versa with the same plane flying both legs. Discounts by air transport companies could be sought as full loads could be ensured on both inward and outward flights and the scheme could be marketed as "Trading Places".

iii) the impact on EC tourism and travel of improved high speed rail links;
iv) the best forms of aid for social tourism in order to improve the seasonal spread of tourism arrivals;
v) research on the potential role of regional airports in tourism promotion, especially in peripheral regions;
(vi) the impact of structural fund spending on transport and tourism in peripheral regions on tourism seasonality.

This report also found substantial data and information gaps. Comparable information across the EC on the holiday patterns of Europeans dates back to the 1986 survey *Europeans and their Holidays* - much has changed since the mid-1980s and an update/extension of this information should be commissioned. Extensions could take place in terms of both the questions asked, such as what are the primary constraints discouraging off-season holidays, and coverage, which could include Efta countries.

The report also found a dearth of comparable information on passenger flows and modes of transport across all European countries. Research presently being commissioned by the EC will help to establish the impact of a European rail network. However, further research into the promotion of and potential for new off-season rail products may be required.

While there was plentiful research on all-season products and on how to cater for the main target groups for off-season tourism (senior citizens, special interest etc.), there was less research on how to attract the considerable numbers of "stay-at-homes" within some of these target groups to holiday in the off-season. Part of the answer to this question relates to spreading social tourism and some of the questions posed on this issue may be answered by research presently being commissioned by the EC. However, there are also individuals and groups outside the ambit of social tourism who, despite having the required flexibility, prefer to holiday during the peak season. Research into their motivations and the scope for influencing these could be undertaken.

Annexes

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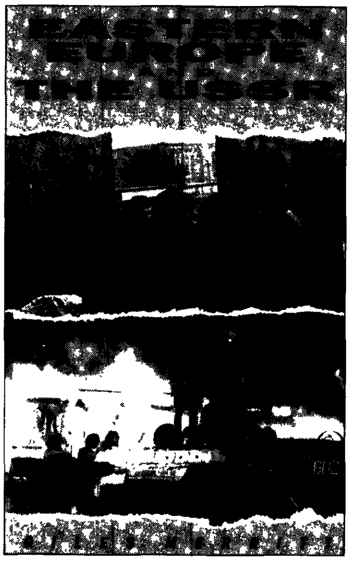
Eastern Europe and the USSR

THE CHALLENGE OF FREEDOM

GILES MERRITT



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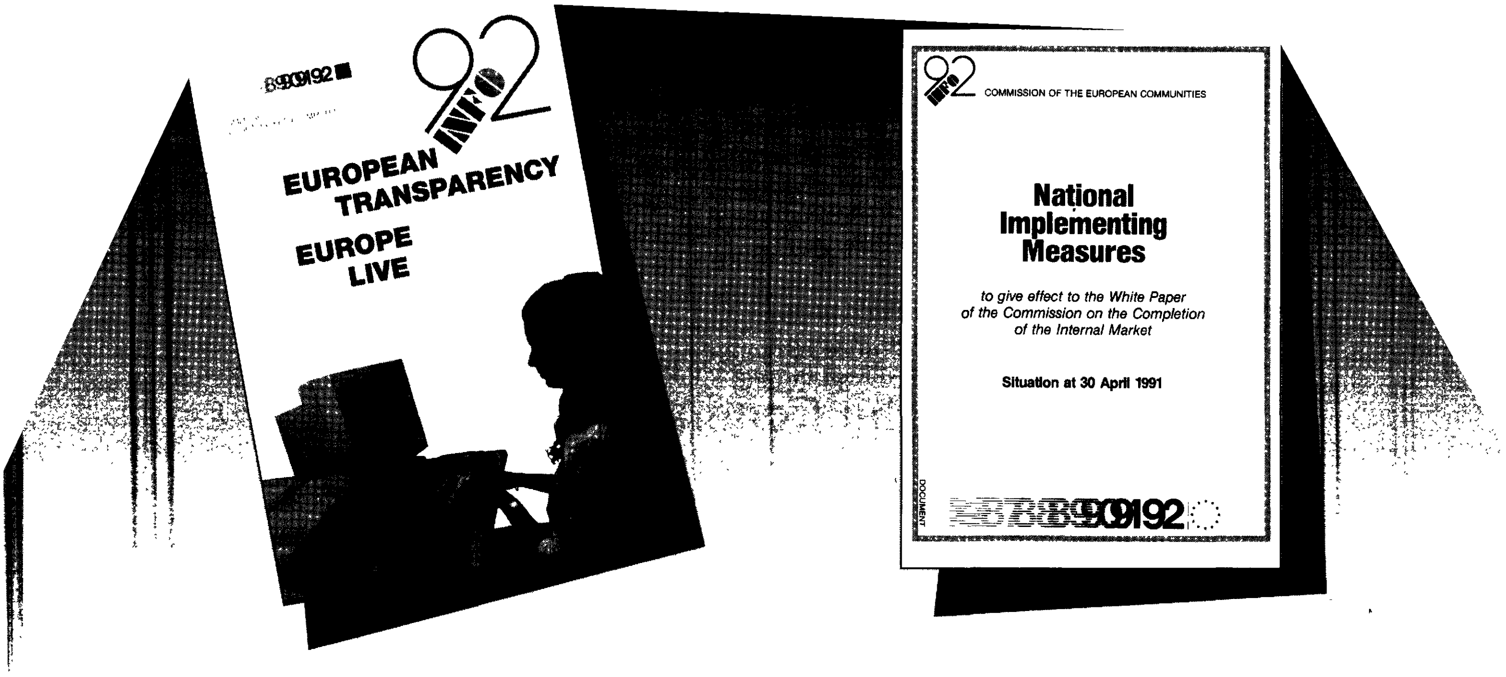

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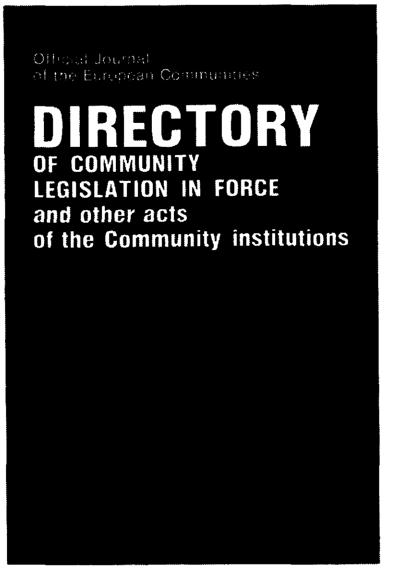

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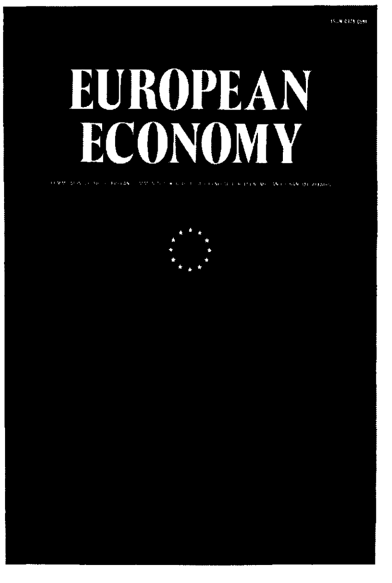

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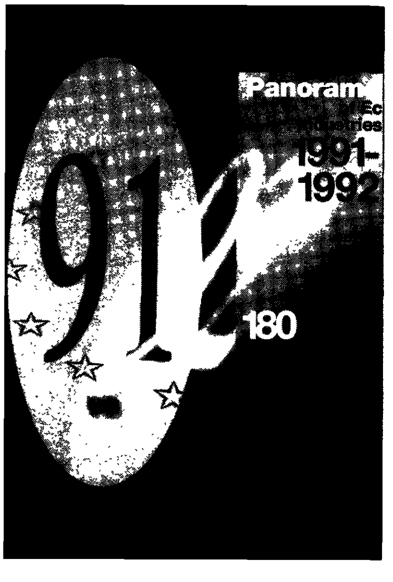

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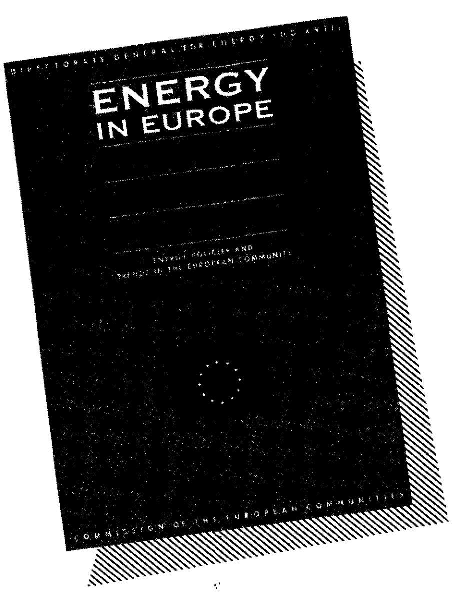

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