

TOURISM IN EUROPE

TRENDS 1989



Cataloguing data can be found at the end of this publication

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"Tourism is an industry of growing importance for Europe. As 1992 approaches and Europe merges into a frontier-free zone, a further profound and positive impact upon tourism is certain. Underlying this scenario is the crucial role played by statistical information, providing both producers and consumers with new and up to date figures as a basis upon which decisions can be made. This publication is the result of work completed by the European Commission to increase awareness of the importance of tourism — both economically and socially — through statistics. The information it contains should serve not only those agents who operate within the tourist industry, but all those wishing to gain an overview of this dynamic and expanding sector."

HENNING CHRISTOPHERSEN
European Commissioner

"In response to the very positive role tourism is expected to play for all countries in years to come, the European Commission has designated 1990 as the European Year of Tourism. Its importance, moreover, has also been recognised by nations outside the Community. Indeed, I am delighted to observe the initiatives taken by the European Free Trade Association, alongside those of the Community. The aim of the EYT is to highlight the importance of tourism through events and initiatives directly linked to tourism. It also seeks to promote the concept of a "People's Europe". It is within the framework of these actions that the Commission has published this document. In so doing, it hopes to increase awareness of the key position held by this industry for both the development of the Community and its relations with the rest of the world."

CARDOSO e CUNHA
European Commissioner



The present publication should be seen within the framework of the objectives of the European Year of Tourism. It seeks to emphasise two main points: firstly, the role which tourism plays within society and secondly, the involvement of the Community in the development of the tourist sector in Europe.

Although tourism is a widespread phenomenon and universally recognised as an important sector of economic activity, there is a shortage of reliable information at Community level. Data are often incomplete or not fully comparable (we may not generalise for all countries), which prevents any serious assessment of its present situation or development.

A determined effort should be made, therefore, to establish a reliable framework of reference, based upon a harmonised and comprehensive series of statistics and on studies investigating the various aspects of tourism and its potential. Furthermore, the system by which statistics are collected and distributed should be improved. In addition, the quality and accuracy of existing data ought to be enhanced.

These data contribute to the information required to formulate Community policy in the field of tourism and interrelated areas.

Eurostat wishes to extend its thanks to the following Organisations and Consultants who have contributed to the realisation of this publication:

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OTHER EUROSTAT PUBLICATIONS RELATING TO TOURISM

'Tourism in Europe' represents one of three major publications scheduled to appear during the EYT.

Completing the trio are:

- 'TOURISM: Yearly Statistics' and
- 'Monthly Trends in Tourism'

(See back page for order form)

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INTRODUCTION

Tourists have always been attracted by Europe's diversity, its wealth of natural resources, its history and its culture. This is why the Continent retains its position as the main tourist destination in the world.

We now stand at the threshold of an exciting historical era. With the completion of the internal market, tourism is becoming increasingly important for Europe; the Old Continent is being challenged to rediscover its own identity and dimension.

As a genuine integrating force, tourism represents the best way of improving reciprocal knowledge between the peoples of Europe and of helping them to discover and forge common cultural links. It testifies to the benefits of an extensive, frontier-free market, which will facilitate co-operation between those involved in tourism in the Member States. At the same time, tourism represents an effective area for collaboration between the Community and the countries of both EFTA and Eastern Europe.

Nevertheless, tourism is not a spontaneous phenomenon: increasingly, more professionals, more workers, more high quality services and more tourist products underlie the development and growth of this industry.

Tourism is an economic sector of major importance in Europe and its contribution to the economic welfare of the community will continue to increase in future decades. As such, Europe, which welcomes millions of visitors every year, must improve its awareness of the economic role tourism plays in order to make the most of the opportunities it offers for regional development and job creation. A special occasion to emphasise the importance of tourism in Europe; to consider its characteristics and needs; to initiate a programme of cooperation between the Commission of the European Communities and the Member States on tourism policy: these are the objectives of the Council of the European Communities' decision to designate 1990 as the European Year of Tourism (EYT).

In order to guarantee the success of the EYT several plans of action have been launched by the Commission.

Steering Committees have been set up at both European and National level, in the EEC Member States and in EFTA countries, following the decision of the latter to join in the Community's initiative.

With their cooperation, activities have been planned in order to stimulate new initiatives and the launch of new tourism products through the co-financing of national and pan-European projects. A month by month events calendar focuses upon special interest holidays and leisure activities; several competitions on aspects of European tourism have been organised, involving widespread participation; special events have been arranged to draw attention to tourism and to ensure full media coverage of the EYT programme.

At the same time, Ministers for Tourism in the Member States,

echoing the EC Commissioner for Tourism, Mr. Cardoso e Cunha, agree upon the need for a new tourism policy aimed at providing improved support for tourism at the European level. This is a necessary step in confronting increasing world competition and consolidating the results of the European Year of Tourism.

Together, the Commission and Member States are working towards the formulation of concrete decisions on professional training, policy on new products, the promotion of tourism in third countries, improvement of cultural and

rural tourism, young people's tourism and new technologies; a further objective is to increase and improve information for both producers and consumers in the tourist industry.

This publication should be viewed as a contribution to the EYT in terms of facilitating the above objectives and of increasing awareness of the importance of tourism in general.

The reports of last year's performance of tourism in the Member States and in Europe as a whole, highlight both positive and nega-

tive trends and focus upon several main indicators; these aim to provide policy-makers and tour operators with fresh, readily accessible figures and information, on basic structural elements as well as on recent trends and market developments.

We trust that this publication will not only succeed in meeting the interests of the sector, but that it will also increase the awareness of European public and political opinion of the importance of tourism for Europe.

Heinrich Von Moltke
Director-General, DG XXIII

Yves Franchet
Director-General, Eurostat



E.C. TOURISM IN 1989

Any synthesis of tourist activity in the Community should take account of the statistical problems related to tourism.

Data are often incomplete, or not fully comparable although we may not generalize for all countries. A comparison of tourist activity in the EC in 1989 with the preceding year must start from these hard facts. The problems mentioned have less significance for yearly comparisons. Notwithstanding these remarks, the magnitude of recent trends in EC tourism can be determined.

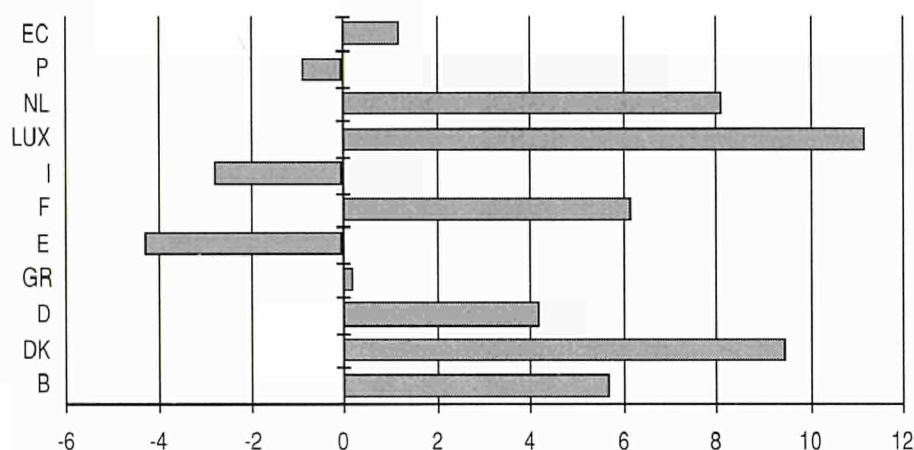
1. The Mediterranean area: a slowdown in 1989

Data on total nights spent in accommodation establishments are available for ten EC countries (no data are available for nights spent by resident tourists in Ireland and the United Kingdom).

It can be estimated that at the European level, total nights spent were 1.2% higher in 1989 than in 1988.

Domestic nights went up by 2.1%. Data on nights spent by non-resident tourists in 1989 are available for the twelve EC Member States.

Total nights spent in accommodation establishments - variation %
1989/88



Nights spent by tourists in accommodation establishments in 1989			
% variation in comparison with the previous year			
Country	Resident tourists	Non-resident tourists	Total tourists
Belgium ¹⁾	4.4	7.8	5.7
Denmark	6.7	13.8	9.5
Germany	3.1	11.3	4.2
Greece	4.8	-1.2	0.2
Spain ²⁾	8.4	-11.4	-4.3
France ²⁾	-0.6	20.2	6.3
Ireland	n.a.	19.2	n.a.
Italy	-0.8	-6.3	-2.8
Luxembourg	-0.4	12.7	11.2
Netherlands ³⁾	6.8	11.7	8.1
Portugal	-0.6	-1.2	-0.4
United Kingdom	n.a.	7.8	n.a.
EC	2.1 ⁴⁾	3.2	1.2 ⁴⁾

¹⁾ Rented villas and apartments not included.

²⁾ Hotel accommodation only.

³⁾ Summer period April-September only.

⁴⁾ Ireland and United Kingdom not included.

These show a 3.2% growth in comparison with the previous year.

In comparison to the general economic growth in the Community the increase in the number of nights is rather moderate. However, a closer look at the table shows a number of differences between the Member States. In all EC countries except four, the number of resident nights registered increased. The highest rate is for Spain with an increase of 8.4%; Portugal (0.6%), France (-0.6%) Italy (-0.8%) and Luxembourg (-0.4%) registered fewer nights for the domestic population than the year before.

The growth disparity is even

greater for non-resident nights. The figures vary from an increase of about 20% in Ireland and France to a fall of more than 11% in Spain. It is important to notice the general decrease of nights spent by non-residents in the Mediterranean countries (except France) and the notable rise in tourist activity in

the more northern EC countries.

Receipts and expenditure in the balance of payments confirm the above-mentioned trend. Tourism receipts decreased in two Mediterranean countries - Italy and Greece - increased in all other countries (except the BLEU).

Tourism receipts in the balance of payments (Ecu) billion			
Country	1988	1989	Variation % ¹⁾ 1989/88
BLEU ²⁾	3.1	2.9	-6.8
Denmark	2.1	2.1	3.6
Germany ³⁾	10.1	11.5	13.4
Greece	2.1	1.8	-6.0
Spain	14.3	14.8	-1.9
France	11.7	15.0	28.7
Ireland	1.1	1.3	17.6
Italy	10.5	10.9	1.9
Netherlands	2.4	2.7	12.8
Portugal ⁴⁾	2.0	2.0	15.8
United Kingdom	9.4	10.3	10.6
EC ⁵⁾	68.7	75.3	9.5

¹⁾ In national currency terms.

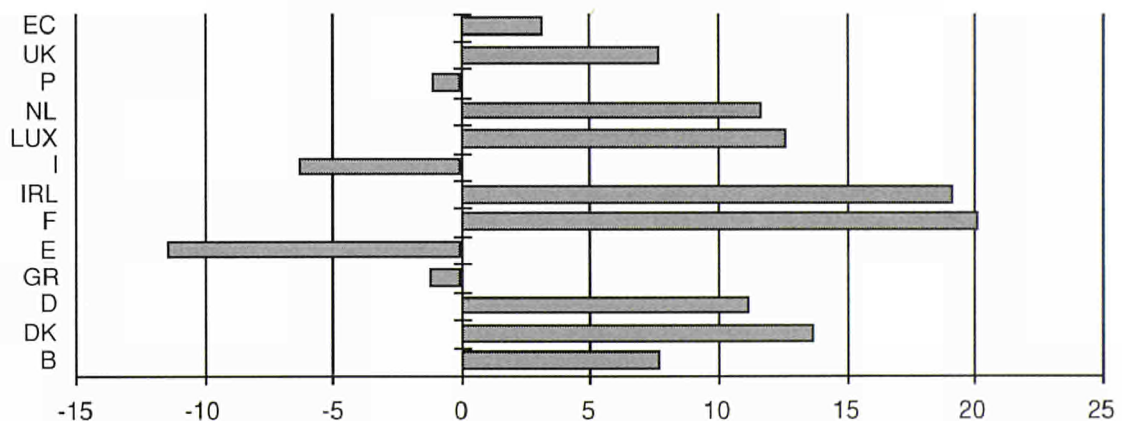
²⁾ Based on the period January-October. Some non-tourist items are included.

³⁾ Including transport.

⁴⁾ The 1989 figures relate to the period January-October; the comparison is based on 10 months.

⁵⁾ In Ecu terms.

Nights spent by non-resident tourists in accommodation establishments - variation % 1989/88





On the other hand, in most of the Mediterranean countries expenditure increased, varying from 12.3% in Portugal to 27.4% in Spain. The result is that the tourism balance of payments for the Mediterranean countries (except Portugal) deteriorated in 1989.

The loss of guest-nights in the Mediterranean countries is due to factors working in the countries of origin as well as in the receiving countries.

The good weather favoured domestic tourism in most northern countries. However, the decline in tourism from the United Kingdom was unfavourable for Spain and Portugal.

The receiving Mediterranean countries suffered from:

- deterioration in the quality of package holidays;
- competition from new destinations such as Tunisia, Turkey, Morocco and Yugoslavia;
- overconcentration of tourism in many resorts;
- deterioration of the environment in many tourist regions (e.g. the algae and mucilage invasion on the Adriatic Coast);
- the lack of snow in Italian winter resorts;
- the failure to adapt tourism products in Italy to new commercial trends.

The favourable results for France are due to several factors: the mild

Tourism expenditure in the balance of payments (Ecu billion)			
Country	1988	1989	Variation % ¹⁾ 1989/88
BLEU ²⁾	4.0	3.8	-5.8
Denmark	2.6	2.7	3.1
Germany ³⁾	24.7	26.0	5.0
Greece	0.6	0.7	27.1
Spain	2.1	2.8	27.4
France	8.2	9.4	14.7
Ireland	0.8	0.9	10.5
Italy	5.1	6.2	19.2
Netherlands	5.7	5.9	2.8
Portugal ⁴⁾	0.5	0.4	12.3
United Kingdom	12.4	14.0	14.0
EC ⁵⁾	66.7	72.8	9.1

1) In national currency terms.

2) Based on the period January-October. Some non-tourist items are included.

3) Including transport.

4) The 1989 figures relate to the period January-October; the comparison is based on 10 months.

5) In Ecu terms.

Tourism balance sheet in the balance of payments (Ecu billion)			
Country	1988	1989	Variation % ¹⁾ 1989/88
BLEU ²⁾	-0.9	-0.9	-2.5
Denmark	-0.5	-0.6	1.4
Germany ³⁾	-14.6	-14.5	0.0
Greece	1.4	1.1	-20.5
Spain	12.2	12.0	-6.9
France	3.5	5.6	62.0
Ireland	0.3	0.4	38.6
Italy	5.4	4.7	-14.3
Netherlands	-3.3	-3.1	-4.7
Portugal ⁴⁾	1.5	1.6	16.9
United Kingdom	-3.0	-3.7	24.3
EC ⁵⁾	2.0	2.5	23.6

1) In national currency terms.

2) Based on the period January-October. Some non-tourist items are included.

3) Including transport.

4) The 1989 figures relate to the period January-October; the comparison is based on 10 months.

5) In Ecu terms.

weather, the continued economic growth in the industrialized world and the commemoration of the

bicentenary of the French Revolution.

2. Seasonal concentration of nights

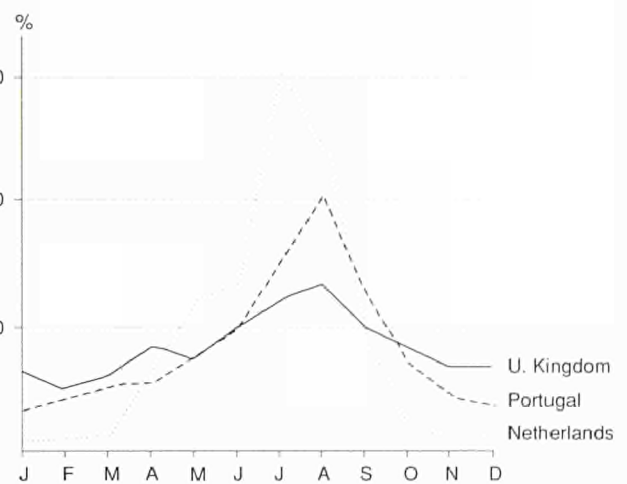
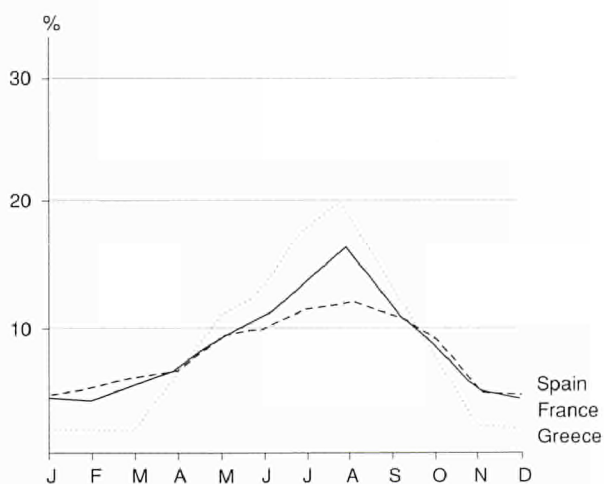
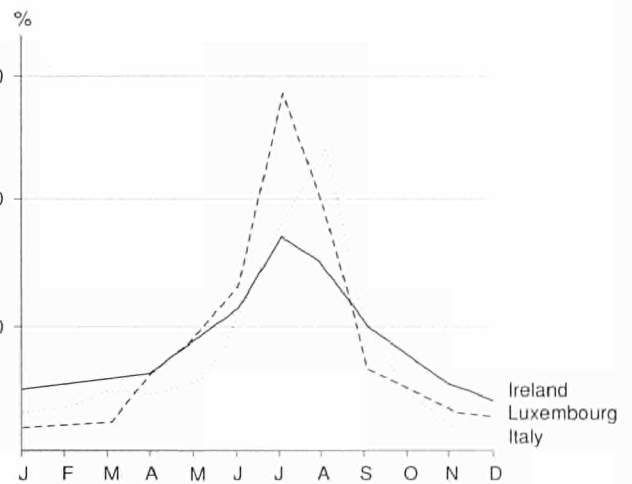
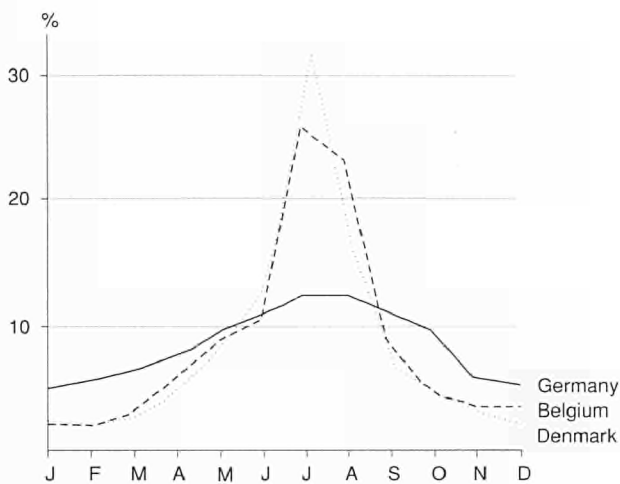
The seasonal distribution of guest nights in EC member countries is shown in the following graphs. These are derived from the DWIF study 'Analysis of actions taken or

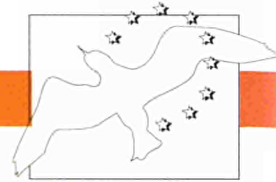
to be taken in Europe and other regions for lengthening the tourist season and creating alternative destinations to mass tourism'.

The seasonal curves of the individual countries illustrate the problem of staggering holidays in all

Member States. However, the seasonal concentration is, in some countries, much stronger than in others. This is particularly the case for the Netherlands, Belgium, Luxembourg, Denmark and Italy.

Seasonal distribution of guest nights in EC Member Countries





3. More receipts (9.5%); more expenditure (9.1%)

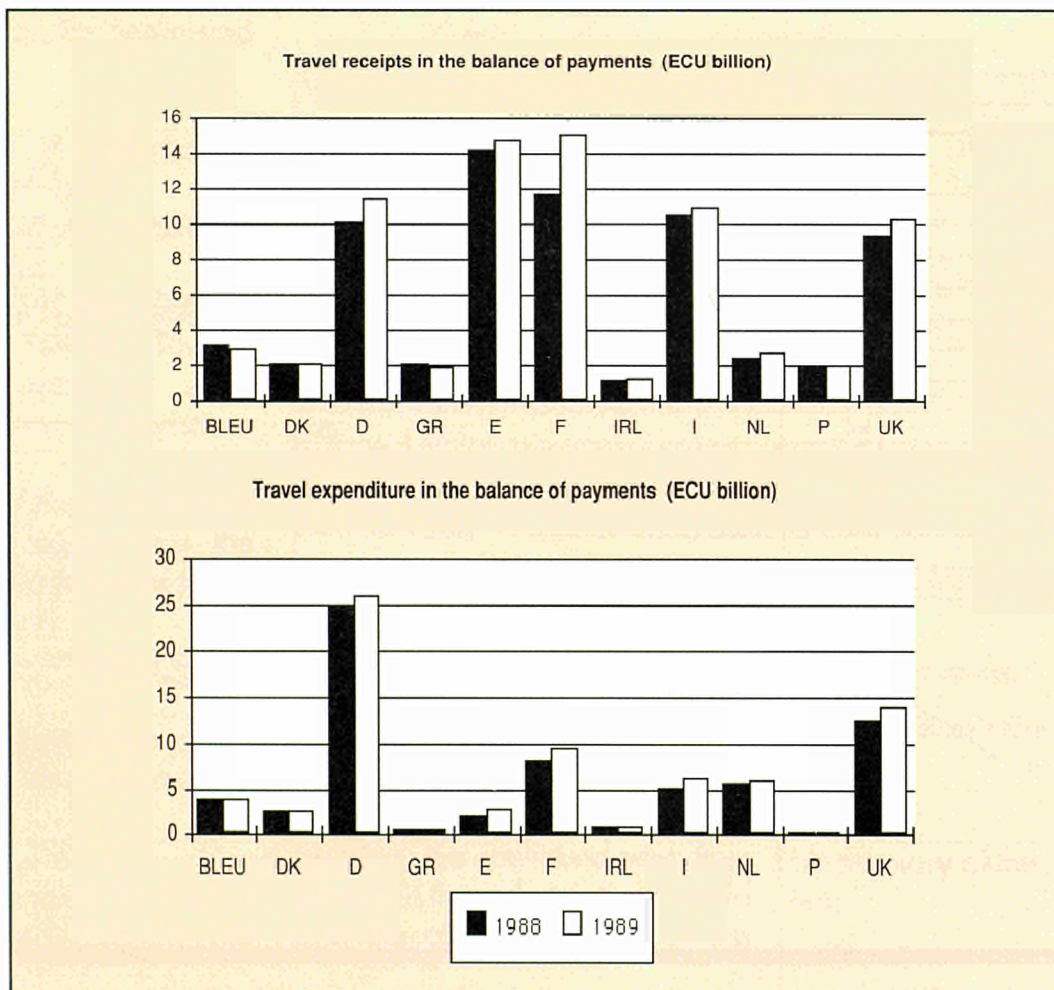
Receipts from international tourism (excluding international fare payments) for the EC amounted to ECU 68.7 billion in 1988 and ECU 75.3 billion in 1989. This is an increase of 9.5% in current price terms. The corresponding expenditure went up from ECU 66.7 billion to ECU 72.8 billion (a growth of 9.1%). The overall balance for the EC - as the sum of the individual countries - is in surplus. In 1989, receipts exceeded expenditure by ECU 2.5 billion; this surplus was only ECU 2.0 billion

in 1988. In fact, this is a relatively small surplus but it represents an improvement of 23.6% on 1988. This surplus cannot be confused with the surplus for the EC (data are not available).

Tourism is clearly much more important for some countries than for others, in terms of both receipts and expenditure. As far as receipts are concerned, France and Spain rank first with about ECU 15 billion. The Federal Republic of Germany and the United Kingdom are by far the biggest spenders on tourism in 1989 with a total expenditure of ECU 26.0 billion

and ECU 14.0 billion respectively compared with expenditure of only ECU 0.4 billion from Portugal.

The country with the most positive tourism balance is undoubtedly Spain with a surplus of ECU 12 billion; France ranks second with a surplus of ECU 5.6 billion. On the other hand the country with the biggest deficit is Germany with a negative balance sheet of ECU 14.5 billion; the United Kingdom comes second (ECU -3.7 billion) before the Netherlands (ECU -3.1 billion).



4. Relatively strong position of tourism in the economies of the EC countries

Four indicators are retained with respect to the position of tourism in the national economies. In terms of GNP the share of tourism can be estimated at about 5%. In comparison with most other sectors, this is a relatively high share. In two countries - Spain (9.4%) and France (9.0%) - the share of tour-

ism amounts to about twice the Community average.

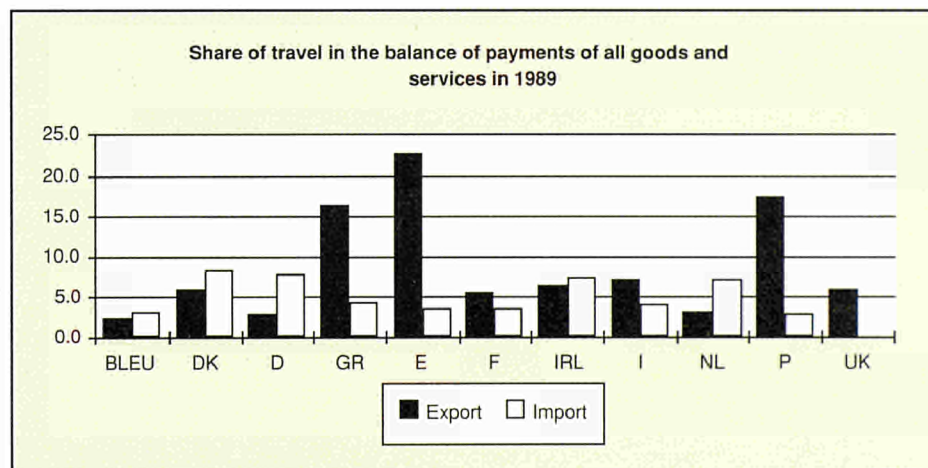
The relative significance of tourism is even higher in terms of employment. Even though most tourism employment, in absolute terms, is in the richer EC countries (due to domestic tourism) the relative importance of tourism employment is greater in other countries. On average tourism accounts for 6% of total employment in the EC, but this figure is exceeded in Spain

(10.2%), Portugal (8.6%), Greece (7.2%), France (6.9 %) and Italy (6.4%).

The share of travel receipts in the total of exports of goods and services is a third main indicator. The vital importance of tourism to Greece, Spain and Portugal is again emphasized: tourism receipts account for 16.3% of total export earnings in Greece, for 22.7% in the case of Spain and 17.3% for Portugal.

Tourism in the economies of the Member States

Country	% Share of travel receipts in exports of goods and services		% Share of travel expenditure in imports of goods and services		% GNP	% employment
	1988	1989	1988	1989	1988	1988
Belgium	3.1	2.3	4.2	3.1	3.0	3.9
Denmark	6.6	6.0	9.2	8.3	4.5	5.3
Germany	3.0	2.9	8.5	7.9	4.6	5.2
Greece	19.6	16.3	4.3	4.3	7.3	7.2
Spain	24.6	22.7	3.3	3.5	9.4	9.3
France	5.2	5.5	3.5	3.5	9.0	6.9
Ireland	6.2	6.3	6.8	7.3	6.2	6.3
Italy	8.1	7.2	3.8	3.9	4.5	6.4
Luxembourg	n.a.	n.a.	n.a.	n.a.	n.a.	5.2
Netherlands	2.9	3.1	7.4	7.2	1.3	2.3
Portugal	17.0	17.3	2.8	2.9	6.0	8.6
United Kingdom	6.0	6.0	n.a.	n.a.	4.0	6.0





5. The main generating countries

The following table gives, for each country, the four most important generating markets. The figure in brackets gives the share in total guest-nights.

It is obvious that the source mar-

kets of the individual member countries are not the same. Nevertheless, one cannot deny the dominant position of Germany and the United Kingdom. Germany is the primary consumer of tourist services in four receiving States and second in another four. The United Kingdom is also the main market

for four Member States and second for two others.

Another result that emerges from the table is that four main markets account for the high share of demand for tourism services in seven out of ten EC countries, for which data are available.

Main generating countries of EC Member States, 1989

Country	First Market	%	Second market	%	Third market	%	Fourth market	%	Share of 1-4 markets (%)
Belgium	Netherlands	43	Germany	15	U. Kingdom	10	France	8	76
Denmark	Germany	36	Sweden	21	Norway	11	Netherlands	7	75
Germany	Netherlands	18	USA	13	U. Kingdom	9	France	5	45
Greece	Germany	24	U. Kingdom	20	Italy	8	Netherlands	6	58
Spain	U. Kingdom	32	Germany	28	France	9	Italy	6	75
France	U. Kingdom	17	Germany	15	Italy	14	USA	10	56
Ireland	U. Kingdom	61	USA	14	Germany	6	France	5	86
Italy	Germany	42	France	8	U. Kingdom	7	Switzerland	6	63
Luxembourg	n.a.		n.a.		n.a.		n.a.		n.a.
Netherlands	Germany	49	U. Kingdom	11	BLEU	7	Scandinavia	5	72
Portugal	U. Kingdom	31	Germany	16	Spain	10	Netherlands	10	67
United Kingdom	n.a.		n.a.		n.a.		n.a.		n.a.

6. Five major conclusions

First, 1989 shows, on the whole an increase in tourism demand in volume as well as in value terms over 1988.

Second, for the first time in the post-war period, the Mediterranean countries register a net decrease in tourist activity both in terms of volume and in terms of nights.

Third, on the whole, tourism has a strong position in the EC economy, especially in the Mediterranean countries (including France). Many indicators suggest this conclusion.

Fourth, the seasonal distribution of tourism is very unequal; five member countries out of 12 show a very high concentration of guest-nights in the months of July and/or August.

Fifth, Germany and the United Kingdom are the two main generating countries in most of the EC Member States. Furthermore, most receiving countries depend strongly on a limited number of markets.



BELGIUM

Non-residents continue to boost tourist activity

The development of tourism during the past decade has been positive, though 1987 proved to be an exception to the general trend. The rate of growth of tourism peaked in 1981 and 1982 due to the devaluation of the Belgian franc in February 1982. From 1983 to 1986 this upward trend was less pronounced, with an annual average increase of 1.9%.

In 1988, total overnight stays by tourists increased by 5.5% compared with the previous year, representing 32.5 million nights. Overnight stays at both campsites and in social tourism accommodation establishments increased by 15% in response to this positive trend.

Since 'social tourism accommodation establishments' group together all accommodation establishments which cannot be classified in other categories, it is impossible to evaluate the contribution of holiday camps and villages to this result.

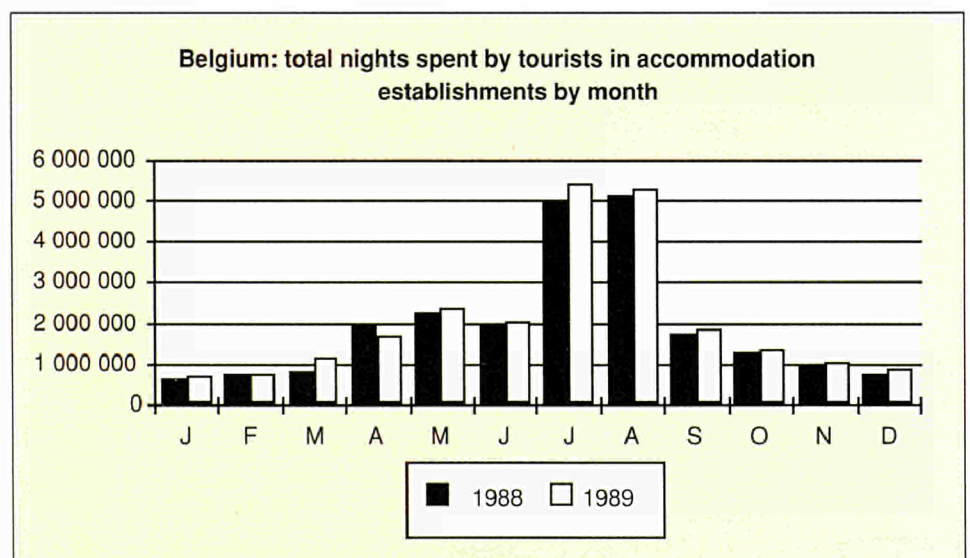
At the end of 1989 tourism in Belgium (in terms of nights spent in registered accommodation establishments excluding apartments

and villas) reinforced this trend with an increase in tourist activity in terms of overnight stays of

24.646 million, a rise of 5.7% on the previous year.

Total nights spent by tourists in accommodation establishments ¹⁾			
Months	1988	1989	Variation % 1989/88
January	621,398	675,026	8.6
February	734,206	745,695	1.6
March	837,862	1,185,760	41.5
April	1,929,583	1,692,706	-12.3
May	2,299,426	2,401,194	4.4
June	2,001,973	2,055,176	2.7
July	4,960,487	5,443,851	9.7
August	5,137,306	5,309,235	3.3
September	1,767,931	1,856,629	5.0
October	1,286,937	1,361,307	5.8
November	951,984	1,027,480	7.9
December	783,455	892,061	13.9
Total year	23,312,548	24,646,120	5.7

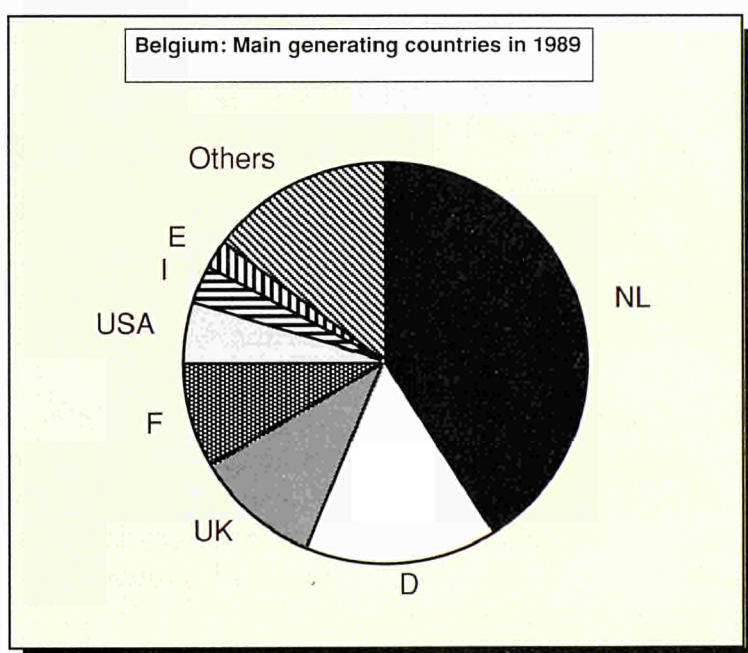
¹⁾ not including villas and apartments. The absolute figures represent more or less 85% of the total number of nights registered during 1989. Nevertheless the computed variations can be taken into account.



Nights spent by resident tourists in accommodation establishments ¹⁾			
Months	1988	1989	Variation % 1989/88
January	215,494	243,467	13.0
February	307,127	308,895	0.6
March	337,584	594,662	76.2
April	1,236,914	988,944	-20.0
May	1,365,270	1,411,049	3.4
June	1,145,234	1,190,553	4.0
July	3,698,498	4,001,215	8.2
August	3,740,851	3,832,858	2.5
September	945,762	991,748	4.9
October	552,194	555,115	0.5
November	442,974	461,169	4.1
December	340,845	385,743	13.2
Total year	14,328,747	14,965,418	4.4

¹⁾ not including villas and apartments. The absolute figures represent more or less 85% of the total number of nights registered during 1989. Nevertheless the computed variations can be taken into account.

Nights spent by non-resident tourists in accommodation establishments			
Main generating countries	1988	1989	Variation % 1989/88
Netherlands	3,759,376	3,988,590	6.1
Germany	1,318,408	1,475,574	11.9
United Kingdom	849,893	964,249	13.5
France	767,768	841,355	9.6
USA	522,506	490,586	-6.1
Italy	271,414	288,046	6.1
Spain	195,159	221,462	13.5
Other European countries	158,530	185,501	17.0
Africa	137,451	164,258	19.5
Asia	154,159	162,951	5.7
Others	849,137	898,130	5.8
Total	8,983,801	9,680,702	7.8



Tourist market shares by country of origin did not change substantially from January to December 1989 compared to the previous year.

The market share of Belgian tourists was slightly lower, falling from 61.8% to 61% ; this may well be due to the omission of nights spent in villas and apartments.

The market share of Dutch tourists was 15.7% of the total with no significant changes with respect to 1988.

The increase in nights spent by French and British tourists failed to alter their shares significantly. Nevertheless this rise accounts for an increase of +9.6% and +13.5% respectively.

Nights spent by Spanish tourists recorded a rise of 13.5%.

The share of tourists from the USA fell from 2.2% to 2% of the total in 1989, a reduction of 10% compared to 1988.

A spectacular growth of +19.9% was recorded by Swedish tourists, although their market share accounted for less than 1% of the total.

A closer examination of these trends by nationality reveals an increase in visitors to Belgium : from Russia (+67.4%), Latin America (+30.4%), Ireland (+25.8%), Japan (+23.9%), Sweden (+19.9%) and Africa (not Zaire). A marked preference for hotel accommodation was revealed.



One can conclude from these results that the trend revealed in 1988 is consolidated in 1989.

The rate of growth is probably even greater, owing to the exclusion of tourism in villas and apartments.

In 1988, the contribution of accommodation establishments and tourist activities to GNP represented 3.3% of the total. This statistic shows that the tourism sector (BFR 149, 268 million) contributes more to GNP than the agricultural sector (BFR 114, 877 million) and slightly more than half of the contribution of the credit and insurance sector.

From 1987 to 1988 GNP for Belgium increased by 6.5%, while tourist output increased by 7.7%. This rate of growth had very little impact upon the development of the relative share of tourism in total GNP.

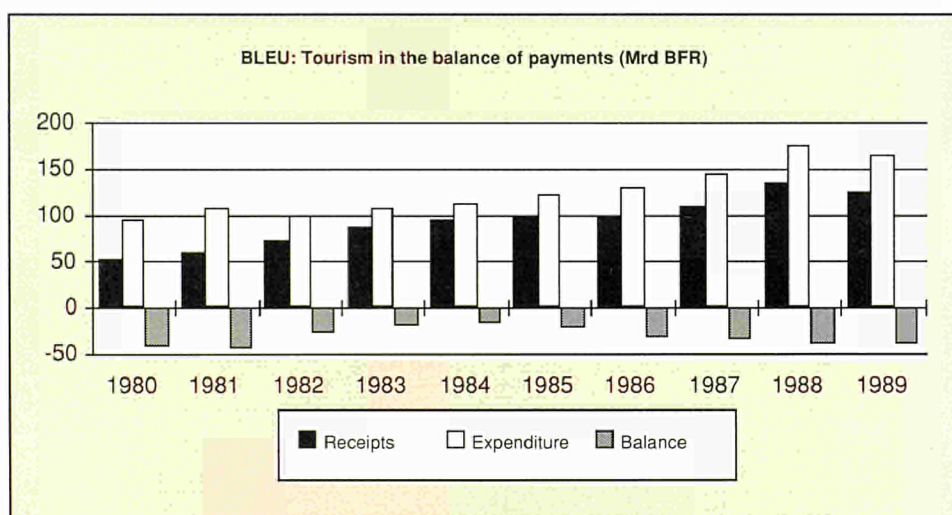
Employment in tourism-related sectors rose by 11.2% from 1987 to 1988. This increase is due to the expansion of the restaurant sector (+18.1%), travel agencies (+10.7%), supplementary accommodation establishments (+8.3%) and car rental (+8.6%).

Within this total, the number of self-employed workers fell by 2.1% from 1987 to 1988. This is, however, not a major economic variable for employment, since the number of independent workers can be compensated for by an increase in the number of legal entities.

Nights spent by non-resident tourists in accommodation establishments ¹⁾			
Months	1988	1989	Variation % 89/88
January	405,904	431,559	6.3
February	427,079	436,800	2.3
March	500,278	591,098	18.2
April	692,669	703,762	1.6
May	934,156	990,145	6.0
June	856,739	864,623	0.9
July	1,261,989	1,442,636	14.3
August	1,396,455	1,476,377	5.7
September	822,169	864,881	5.2
October	734,743	806,192	9.7
November	509,010	566,311	11.3
December	442,610	506,318	14.4
Total year	8,983,801	9,680,702	7.8

¹⁾ not including villas and apartments. The absolute figures represent more or less 85% of the total number of nights registered during 1989. Nevertheless the computed variations can be taken into account.

Contribution of tourism to the economy		1988
Contribution to GNP (BFR Mio)		149,268
Contribution to employment (direct employment)		132,477
% of total GNP		3.0
% of total employment		3.9



For the hotel sector, the decline in the number of independent workers was offset to a great extent by an increase in the number of salaried workers.

The creation of new labour-inten-

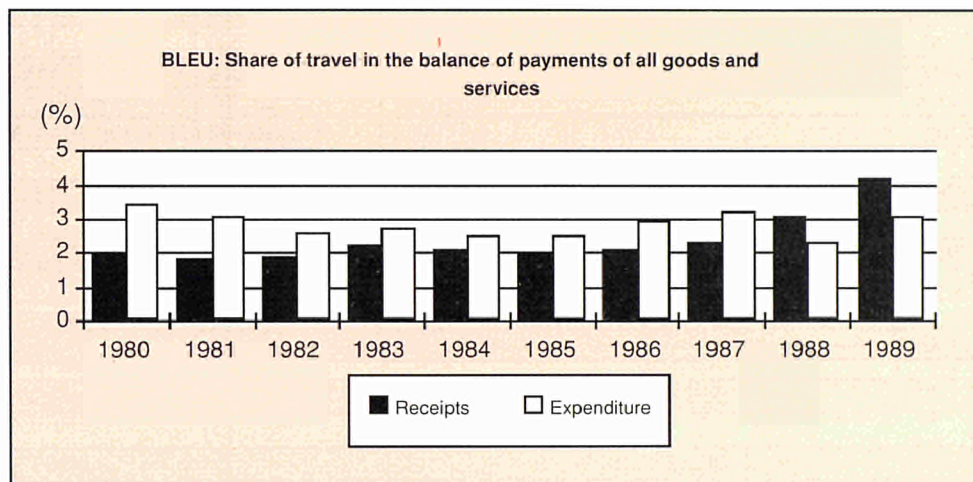
sive enterprises in the restaurant sector (+0.4%) and travel agencies sector (+5%) resulted in a rise in salaried employment of +24.8% and +11% respectively.

Tourism in the balance of payments (BFR billion)	1988	1989	Variation % 1989/88
Receipts	134,400	125,300	-6.8
Expenditure	173,800	163,700	-5.8
Balance sheet	-39,400	-38,400	-2.5
<i>Share of 'Travel' receipts in exports of goods and services</i>	3.1%	2.3%	
<i>Share of 'Travel' expenditure in imports of goods and services</i>	4.2%	3.1%	

¹⁾ Evaluation on the basis of 10 comparable months.

The increase in receipts from international tourism calculated on 1987 amounts to 12.5%, against 15.1% for expenditure. The balance for receipts and expenditure is negative for all Member States, with the exception of those related to tourism for Germany and the Netherlands and for Denmark since 1988.

Community trade in international tourism represented 70.5% of the total for this item in the balance of payments.



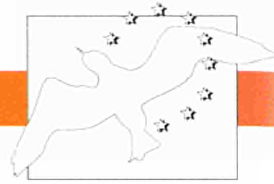
From the totals obtained for receipts and expenditure, France, Germany, the Netherlands, the United Kingdom, Spain and Italy stand out as the main generating and receiving countries for tourism.

Receipts from 'passenger transport' reveal a weak performance for this sector, with a fall in revenue registered in November 1988.

Comparing the aggregate results for the first 10 months of 1988 and 1989, it can be seen that the level of receipts attained in 1989 is 6.8% below that recorded for 1988.

Similarly for expenditure, which amounted to only 94.2% of 1988 expenditure. The deficit on the tourism balance was reduced by 2.5% in 1989.

Residents' tourism	1988
Number of holiday days spent in the country	329,135
Number of holiday days spent abroad	7,688,058



DENMARK

Danish coast attracts international tourists

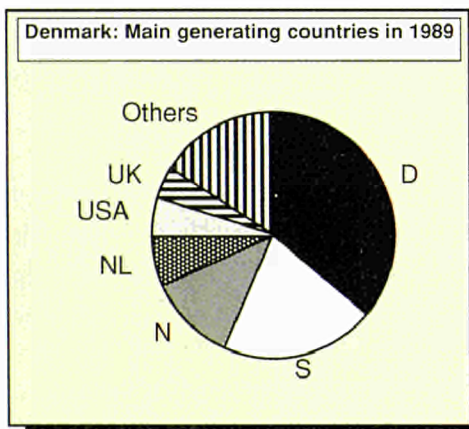
Statistical data for 1989 reveal a further increase in overnight stays, a trend that reflects good weather conditions during the summer season.

Overnight stays by resident tourists increased by 6.7% and overnight stays by non-residents by 13.8%, resulting in a total increase of 9.4%.

The major tourist generating countries are the Federal Republic of Germany (about 36%), Sweden (about 21%) and Norway (about 11%).

Total nights spent by tourists in accommodation establishments			
Months	1988	1989	Variation % 1989/88
January	392,100	416,200	6.1
February	470,600	504,500	7.2
March	688,900	852,200	23.7
April	982,100	1,082,600	10.2
May	1,797,800	2,004,000	11.5
June	2,557,700	2,701,300	5.6
July	6,171,000	6,469,900	4.8
August	3,199,500	3,732,500	16.7
September	1,292,900	1,469,800	13.7
October	909,900	974,400	7.1
November	603,400	643,400	6.6
December	384,900	437,700	13.7
Total year	19,450,800	21,288,500	9.4

Nights spent by resident tourists in accommodation establishments			
Months	1988	1989	Variation % 1989/88
January	255,700	264,200	3.3
February	322,500	333,700	3.5
March	484,700	572,500	18.1
April	677,700	754,200	11.3
May	1,210,500	1,303,300	7.7
June	1,585,200	1,659,600	4.7
July	3,689,000	3,886,900	5.4
August	1,579,300	1,705,500	8.0
September	807,900	892,200	10.4
October	623,800	640,200	2.6
November	396,300	399,400	0.8
December	226,800	238,700	5.2
Total year	11,859,400	12,650,400	6.7



Nights spent by non-resident tourists in accommodation establishments			
Months	1988	1989	Variation % 1989/88
January	136,400	152,000	11.4
February	148,100	170,800	15.3
March	204,200	279,700	37.0
April	304,400	328,400	7.9
May	587,300	700,700	19.3
June	972,500	1,041,700	7.1
July	2,482,000	2,583,000	4.1
August	1,620,200	2,027,000	25.1
September	485,000	577,600	19.1
October	286,100	334,200	16.8
November	207,100	244,000	17.8
December	158,100	199,000	25.9
Total year	7,591,400	8,638,100	13.8

The propensity to travel of the Danish population was, at 68% (adult population) already very high in 1987 and is expected to increase again in 1989.

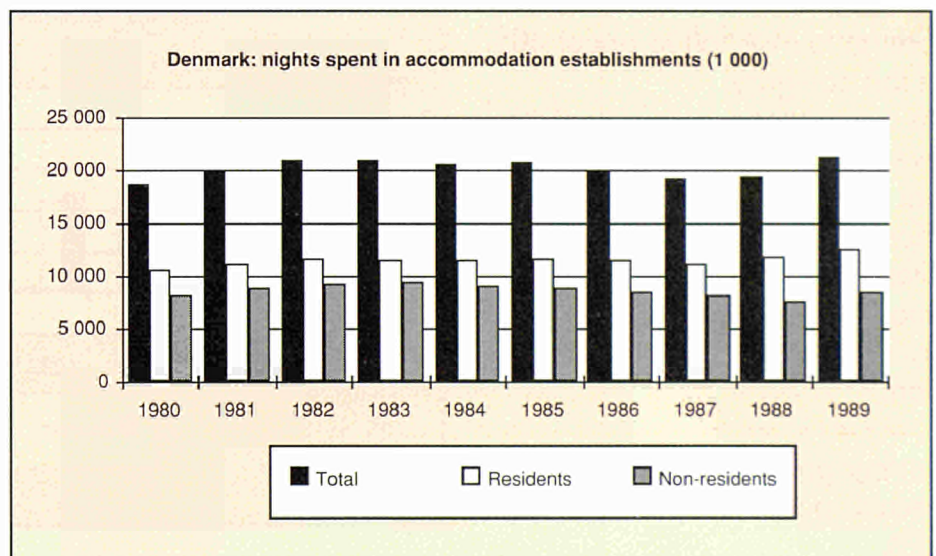
The number of overnight stays per 100 inhabitants in 1989 equaled those for Germany. (around 400). This resulted in a contribution to GNP of about 2%. Including daytrips and income derived from those travelling abroad (mainly from transportation) the total contribution of tourism to Danish GNP should be between 4 and 5%. It can be assumed that daytrips play an important role in total tourist demand and possibly exceed receipts from overnight stays.

Growth in foreign exchange earnings of 3,6% is less than the increase in overnight stays by foreign visitors.

Nights spent by non-resident tourists in accommodation establishments ¹⁾		
Main generating countries	1989	Share %
Germany	3,129,900	36.2
Sweden	1,793,700	20.8
Norway	978,700	11.3
Netherlands	586,400	6.8
USA	431,500	5.0
United Kingdom	363,100	4.2
Others	1,354,800	15.7
Total	8,638,100	100.0

¹⁾ Estimate.

Residents' tourism	1987 %
Holiday departure rate:	
in the country	23
abroad	45





Expenditure by Danes increased by 3.1%. The balance on the travel account is negative, which is not surprising, since two-thirds of Danish holiday-makers choose destinations abroad.

A substantial part of the foreign exchange earnings from tourism probably originate from transit traffic (Norwegians, Swedes and Germans).

Considering the absolute number of overnight stays, two-thirds to three-quarters of receipts from travel in the Balance of payments may be due to transit visitors.

Tourism in the Balance of payments plays quite an important role, with a share of 6% in 'exports' and 8.3% in 'imports'.

One characteristic of tourism in Denmark is the high proportion of nights spent in supplementary accommodation establishments (mostly camp-sites).

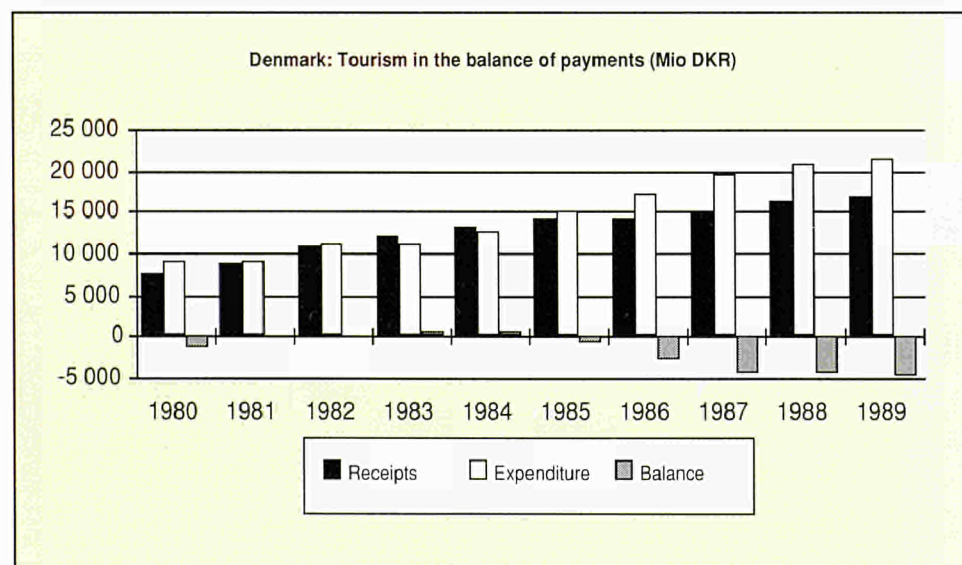
About 62% of overnight stays by residents are registered in supplementary accommodation establishments while overnight stays by foreign tourists fall to about 40% in this category.

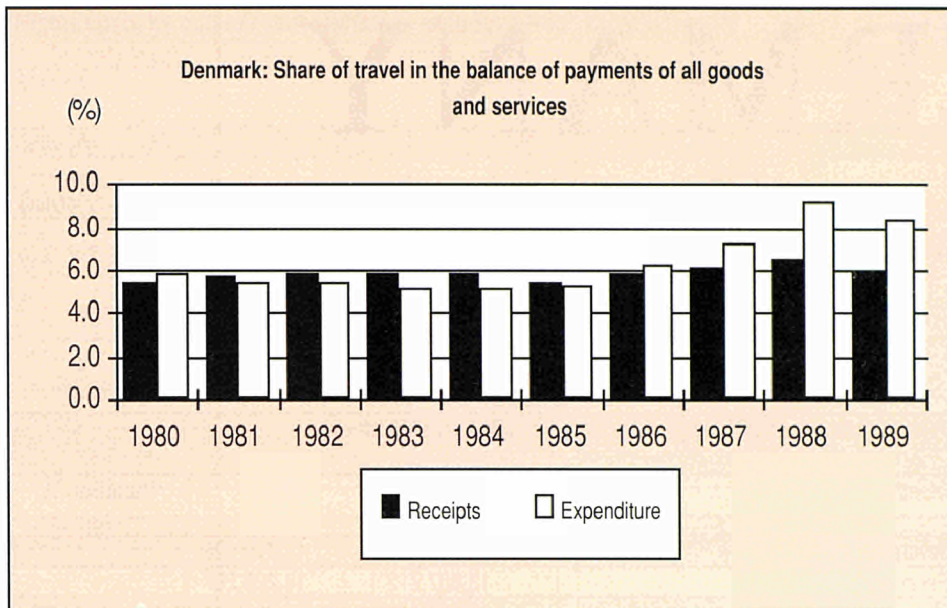
As a result the seasonality of total overnight stays is rather pronounced, due to the seasonal distribution of overnight stays at camp sites. The weakest seasonal influence is reflected in overnight stays by residents in hotel accommodation.

Further growth in overnight stays seems possible, provided that

Contribution of tourism to the economy		1988
Contribution to GNP (Mio DKR)		26,697
of which: hotels and restaurants (Mio DKR)		8,899
Contribution to employment (units)		140,000
of which: hotels and restaurants (units)		53,000
% of total GNP (total)		4.5
% of total GNP (hotels and restaurants)		1.5
% of total employment (total)		5.3
% of total employment (hotels and restaurants)		2.0

Tourism in the balance of payments (Mio DKR)	1988	1989	Variation % 1989/88
Receipts	16,308	16,898	3.6
Expenditure	20,783	21,434	3.1
Balance sheet	-4,475	-4,536	1.4
Share of 'Travel' receipts in exports of goods and services	6.6%	6.0%	
Share of 'Travel' expenditure in imports of goods and services	9.2%	8.3%	





supply increases. This is particularly important in the context of foreign tourism demand.

As Denmark is, geographically speaking, one of the closest Western European countries to the German Democratic Republic and has a relatively large number of camp-sites, a significant increase in visitors from the GDR might well be expected.

As far as Danish holiday-makers are concerned, a further increase in the propensity to travel can be expected.



GERMANY

Inflows and outflows continue to rise

1989 reveals a slight increase in the number of overnight stays as well as in the travel balance. This should, however, be seen as a 'normal' rate of growth rather than one resulting from exogenous influences.

The opening of the borders to the German Democratic Republic in November 1989 had no impact upon the number of overnight stays since most of the visits from the GDR were day trips. There is also little effect in this respect on the balance of payments, since most visitors were spending only the amount of money granted to them by the German Government (DM 100 per visitor per year).

The propensity to travel (holidays away from home) in 1989 involved 66.8% of the German population.

The economic impact of tourism is likely to be equivalent to the growth in tourism in relation to overall economic development.

The number of overnight stays by residents increased by 3.1%, and by non-residents by 11.3%, resulting in a total growth in nights

Total nights spent by tourists in accommodation establishments			
Months	1988	1989	Variation % 1989/88
January	11,698,800	12,618,628	7.9
February	13,807,712	14,229,267	3.1
March	15,747,069	17,435,616	10.7
April	16,844,098	17,290,462	2.6
May	21,488,998	23,194,134	7.9
June	24,287,275	23,945,406	-1.4
July	27,990,452	28,629,526	2.3
August	27,941,506	28,986,040	3.7
September	26,143,023	27,031,557	3.4
October	22,677,863	23,226,865	2.4
November	13,098,880	14,016,359	7.0
December	11,704,367	12,581,027	7.5
Total year	233,430,043	243,184,887	4.2

Nights spent by resident tourists in accommodation establishments			
Months	1988	1989	Variation % 1989/88
January	10,347,070	11,094,237	7.2
February	11,759,912	12,062,365	2.6
March	13,835,529	15,252,269	10.2
April	14,765,967	14,891,546	0.9
May	18,970,633	20,371,219	7.4
June	21,237,350	20,834,773	-1.9
July	24,006,431	24,245,418	1.0
August	24,028,004	24,650,237	2.6
September	22,879,731	23,355,185	2.1
October	19,874,449	20,153,347	1.4
November	11,397,364	11,967,169	5.0
December	10,235,347	10,801,889	5.5
Total year	203,337,787	209,679,654	3.1

spent of 4.2%. It should be emphasised that overnight stays are registered only in accommodation es-

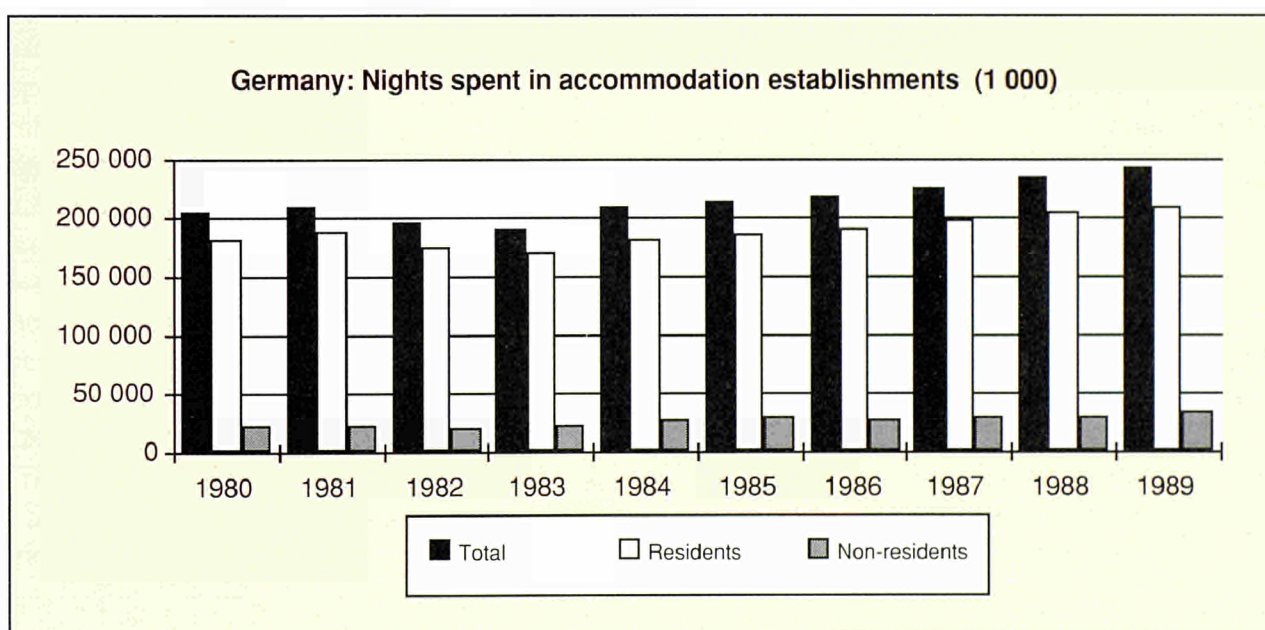
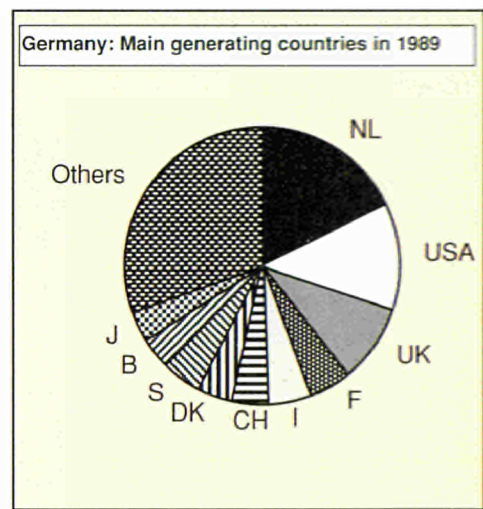
tablishments with more than eight beds. It is estimated that 50 to 60 million nights are spent in smaller

Nights spent by non-resident tourists in accommodation establishments			
Months	1988	1989	Variation % 1989/88
January	1,351,730	1,524,391	12.8
February	2,047,800	2,166,902	5.8
March	1,911,540	2,183,347	14.2
April	2,078,131	2,398,916	15.4
May	2,518,365	2,822,915	12.1
June	3,049,925	3,110,633	2.0
July	3,984,021	4,384,108	10.0
August	3,913,502	4,335,803	10.8
September	3,263,292	3,676,372	12.7
October	2,803,414	3,073,518	9.6
November	1,701,516	2,049,190	20.4
December	1,469,020	1,779,138	21.1
Total year	30,092,256	33,505,233	11.3

accommodation establishments (e.g. private beds) not including overnight stays with friends and relatives.

Among the major tourist-generating countries are the Netherlands, the USA, the United Kingdom, France and Italy. The highest growth rates are noted for visitors from Japan, Italy, the United Kingdom and Sweden.

Nights spent by non-resident tourists in accommodation establishments			
Main Generating countries	1988	1989	Variation % 1989/88
Netherlands	5,690,235	5,963,364	4.8
USA	3,874,820	4,230,468	9.2
United Kingdom	2,558,954	2,963,561	15.8
France	1,466,820	1,657,966	13.0
Italy	1,413,465	1,664,890	17.8
Switzerland	1,365,079	1,513,276	10.9
Denmark	1,359,130	1,404,417	3.3
Sweden	1,296,419	1,499,421	15.7
Belgium	1,080,110	1,208,753	11.9
Japan	1,054,941	1,265,140	19.9
Others	8,932,283	10,133,977	13.5
Total	30,092,256	33,505,233	11.3





The growth in foreign demand in 1989 over 1988 is also reflected in the growth of foreign exchange earnings. A major part of foreign exchange receipts originates from day visitors and transit travellers who do not stay overnight.

In 1989, outgoing tourism resulted in expenditure of more than DM 53 million (including passenger transport). This represents growth of 5% more than in 1988 and in particular can be accounted for by price increases in receiving countries.

Holiday travel abroad which had shown constant growth during the past few years, increased again in 1989 (+6.3%).

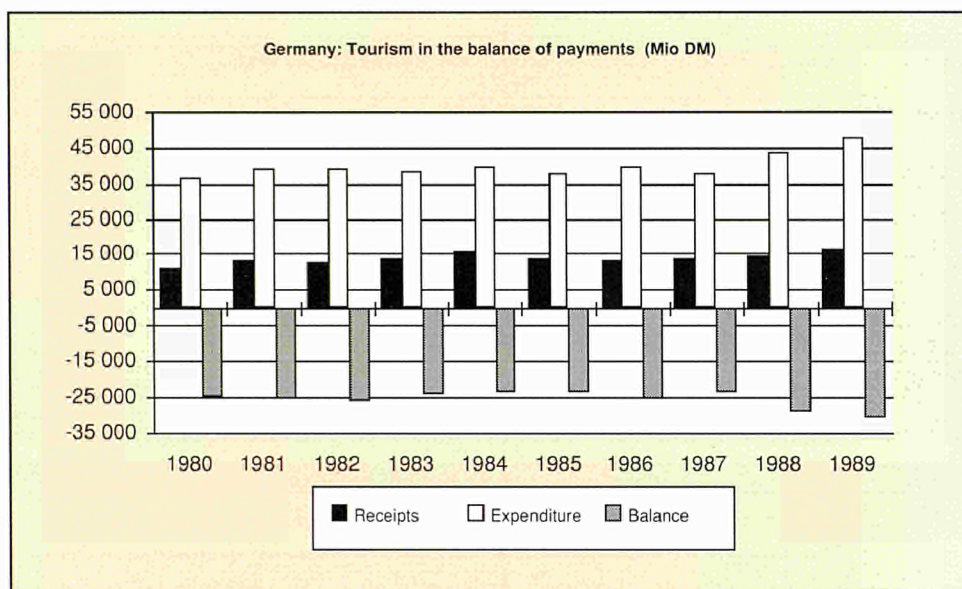
As far as the impact of tourism on the national economy is concerned, its contribution will remain the same (in % terms) as in 1988. The impact on employment (direct and indirect) is slightly higher than on GNP (with a lower average income per employed person in tourism than in all economic activities).

The contribution of tourism to GNP includes all kinds of tourism demand (e.g. daytrips, business travel and 'health' tourism). For overnight stays the contribution would be around 2%.

As in many advanced European countries, daytrips play an important part in total tourist demand. In Germany a recent population survey indicates that more than

Tourism in the balance of payments (Mio DM)	1988	1989	Variation % 1989/88
Receipts	21,047	23,862	13.4
Expenditure	51,198	53,769	5.0
Balance sheet	-30,151	-29,907	-0.8
Share of 'Travel' receipts in exports of goods and services	3.0%	2.9%	
Share of 'Travel' expenditure in imports of goods and services	8.5%	7.9%	

¹⁾ Including transport.



Contribution of tourism to the economy ¹⁾	1988
Contribution to GNP (Mio DM)	97,000
Contribution to employment (Mio units) ²⁾	1.4
% of total GNP	4.6
% of total employment	5.2

¹⁾ including all types of tourist demand (e.g. daytrips).

²⁾ Direct and indirect employment (equivalent of full-time jobs).

1.200 million daytrips for leisure purposes are made per annum. In addition there are about 300 million business trips not connected with overnight stays, which add up to a total of 1.5 billion daytrips. The economic value of this tourist demand, measured in revenue terms, is greater than total overnight stays.

Of all overnight stays including those in establishments with less than nine beds but excluding visits to friends and relatives, about half represent those of holiday makers, one-quarter are business travellers and one-quarter are connected with recuperation (health tourism).

It is expected that the number of overnight stays will increase further. The number of foreign visitors has shown remarkable growth during the last decade and is expected to register a growth rate exceeding that of domestic demand.

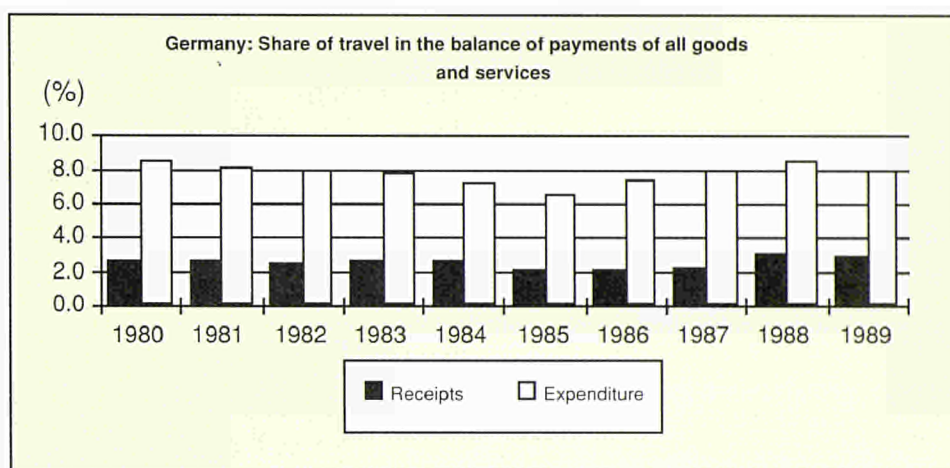
Tourists from the German Democratic Republic, having had few opportunities in the past to visit the Federal Republic of Germany, are expected to arrive in great numbers once economic problems have been alleviated. For the time being, their demand will focus up on low-priced accommodation facilities like camping and private bed-and-breakfast supply.

A likely reunification of the two German States will lead to a significant increase in domestic tourism.

Although daytrips are already made by about 90% of the population in the Federal Republic of Germany (an average of 20 trips per inhabitant) a further increase in this tourist demand is expected.

The economic impact of tourism is

expected to exceed a 5% contribution to GNP and should approach a 6% share of total employment (full-time job equivalent). Connected with this development is an increasing shortage of trained personnel in the hotel-and-catering sector.



Residents' tourism ¹⁾	1988
Holiday departure rate: ²⁾	
in the country	22%
abroad	43%
Number of holiday days spent in the country	190 Mio
Number of holiday days spent abroad	360 Mio

¹⁾ Including holidays with friends and relatives.

²⁾ Population aged 14 years and over.



GREECE

Two standstill years after four years of growth

In Greece, tourist flows originating from abroad accounted for 75% of the demand for tourism and accommodation-related services, determining to a large extent the results obtained for tourist activities.

Having confronted certain difficulties during the early 1980s, tourism from abroad recorded strong growth from 1984 to 1987 which slowed in 1988.

1989 confirmed and emphasized the signals emitted during the previous year. The final result remained unchanged. Growth remained stagnant, with positive elements counteracted by negative ones. Certain difficulties were envisaged at the beginning of the year in relation to reservations made by main international tour operators. Yet, the Greek tourist authorities had confidence in the upward trend in national income for the main Greek-bound demand-generating countries, and forecasted an increase of 2.7% for foreign visitors and consequently

a growth in tourism receipts of about 10%.

In fact the results were less satisfactory and as a result of the growth in the number of Greeks travelling abroad, the tourism balance was not positive overall.

Arrivals of visitors at the frontiers in 1989 amounted to 8.4 million, i.e. 2.8% less than expected.

The most serious drop in arrivals

was recorded for tourists from the United Kingdom (- 13.4%) and France (- 8.3%).

Conversely, there was an upturn in arrivals from Germany (+ 12.9%), the Netherlands (+ 14.4%), Switzerland (+ 17.2%) and Italy (+ 8.5%). Tourist arrivals from the USA, which were expected to be equal to those in 1988, increased by 6.8%.

The number of overnight stays by

Arrivals of visitors at the frontiers (1 000)			
Months	1988	1989	Variation % 1989/88
January	111	117	5.4
February	116	126	8.6
March	223	248	11.2
April	467	481	3.0
May	948	922	-2.7
June	1,040	1,046	0.6
July	1,612	1,546	-4.1
August	1,582	1,667	5.4
September	1,126	1,201	6.7
October	705	722	2.4
November	155	158	1.9
December	146	155	6.2
Total year	8,231	8,389	1.9

Source: National organization of tourism.

non-resident tourists in hotels and similar establishments in Greece fell by approximately 420 000, representing a percentage variation on the previous year of -1.2%.

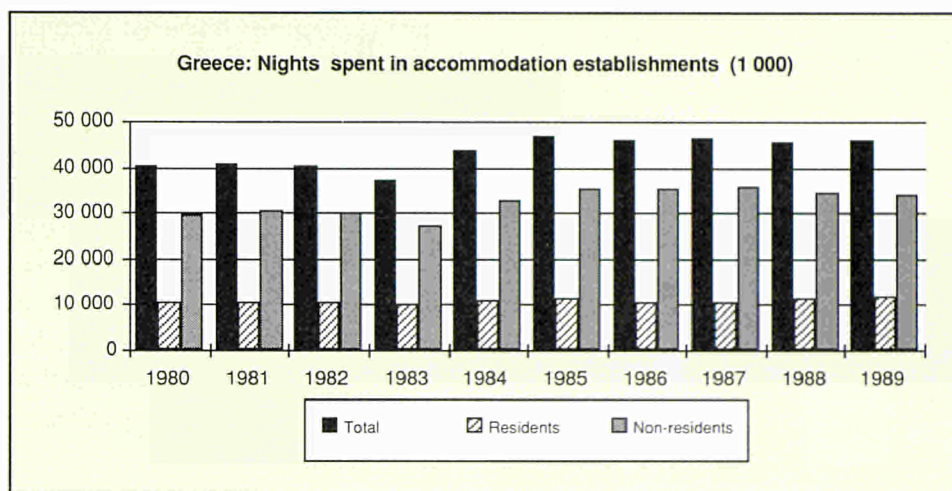
This trend reflected a major reduction in the average length of stay by non-resident tourists in Greece. The fall in the number of overnight stays was particularly marked in the case of British (-14.9%), French (-10.7%) and Yugoslavian (-7.8%) tourists.

Conversely, a considerable increase was recorded in overnight stays by German (+8.4%), Italian (+6.9%), Dutch (+10.9%), Danish (+4.2%) and American (+4.5%) tourists.

A strong rise in tourism demand by residents was noted in 1989: overnight stays by Greeks in hotels and similar establishments increased by roughly 530 000 i.e. 4.6% higher than in 1988.

As a result of the above-mentioned trends, total tourist demand for hotel accommodation remained almost the same as in 1988 (+0.2%); direct and indirect employment in tourist activities grew by approximately 1.3% in 1989.

The fall in overnight stays by non-resident tourists resulted in a signi-

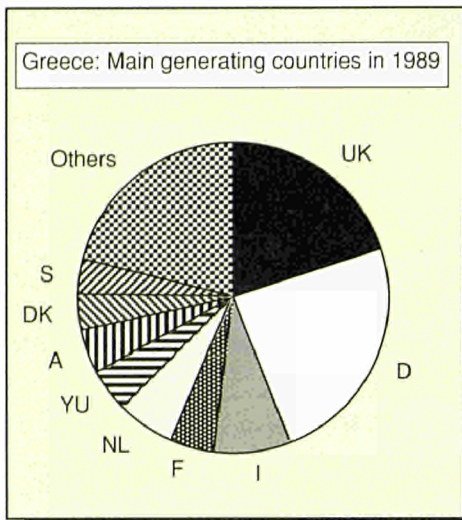


Nights spent by non-resident tourists in accommodation establishments (1 000)

Months	1988	1989	Variation % 1989/88
January	230	229	-0.4
February	269	261	-3.0
March	609	710	16.6
April	2,286	1,814	-20.6
May	4,080	4,343	6.4
June	4,995	4,935	-1.2
July	6,189	5,942	-4.0
August	6,891	6,786	-1.5
September	5,221	5,384	3.1
October	3,015	2,972	-1.4
November	450	444	-1.3
December	257	250	-2.7
Total year	34,492	34,070	-1.2

Nights spent by non-resident tourists in accommodation establishments (1 000)

Main generating countries	1988	1989	Variation % 1989/88
United Kingdom	8,016	6,822	-14.9
Germany	7,526	8,158	8.4
Italy	2,618	2,799	6.9
France	1,781	1,590	-10.7
Netherlands	1,804	2,001	10.9
Yugoslavia	1,653	1,524	-7.8
Austria	1,598	1,588	-0.6
Denmark	1,269	1,322	4.2
Sweden	1,279	1,262	-1.3
Norway	984	994	1.0
USA	952	995	4.5
Others	5,012	5,015	0.1
Total	34,492	34,070	-1.2



ficant reduction in tourist receipts in the balance of payments, falling from DR 346 to 324.7 million (-6.0%) ; this reduction in receipts was considerably less than that in real terms, due to the deterioration in the real purchasing power of the drachma during the year. In fact, the fall in tourist receipts for Greece was more pronounced in ECU terms, and even more so in dollar terms ;

The rise in Greek tourist demand

recorded for hotel accommodation in the country was matched by a similar rise in the demand for foreign travel.

As regards the travel item in the balance of payments, there was an increase of 27.1% in expenditure in comparison with 1988 ; this increase is still significant if translated into ECUs or dollars.

As a consequence of opposing trends in receipts and expenditure in the balance of payments for tourism and the devaluation of the drachma during 1989, the positive balance is estimated to fall significantly in drachma (-20.5%), ECU or dollar terms.

With respect to the changes in 1989, these can be attributed both to endogenous factors and to more general exogenous changes.

Among the endogenous factors were instability in the cost of living for tourists in Greece, together with a slight decline in tourism supply, both specific (related to tourist activities) and general (relating to services as a whole).

Such factors favour the development of a particular tourism demand segment: that of young persons, which is spontaneous and characterised by below average tourist expenditure.

The promotion of a more organized, stable and sophisticated demand are thus being partly impeded.

Among the exogenous factors to underline is the fact that some changes (in the demographic and generation structures of tourism-

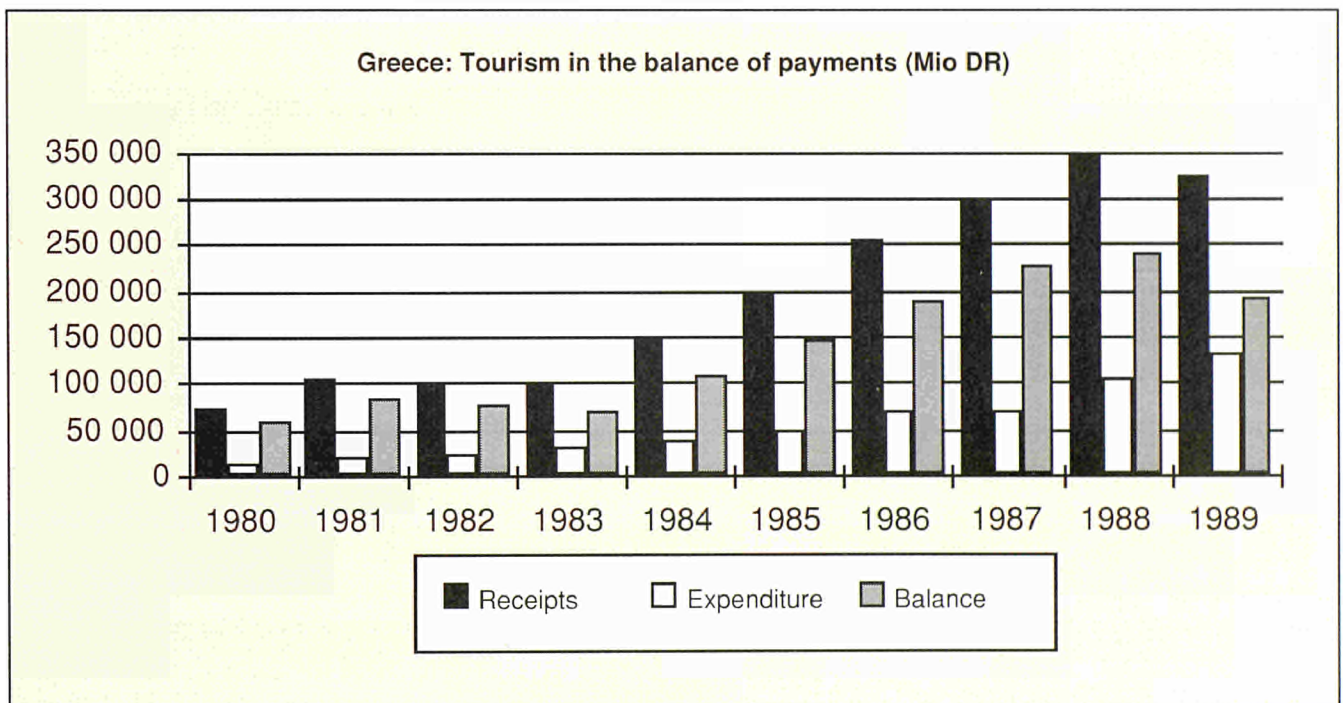
Months	1988	1989	Variation % 1989/88
January	579	630	8.8
February	599	626	4.5
March	721	733	1.7
April	840	1,005	19.6
May	755	874	15.8
June	857	838	-2.2
July	1,877	1,843	-1.8
August	2,032	2,150	5.8
September	1,091	1,164	6.7
October	781	746	-4.5
November	633	655	3.5
December	619	648	4.7
Total year	11,384	11,912	4.6

Months	1988	1989	Variation % 1989/88
January	809	859	6.2
February	868	887	2.2
March	1,330	1,443	8.5
April	3,126	2,819	-9.8
May	4,835	5,217	7.9
June	5,852	5,773	-1.3
July	8,066	7,785	-3.5
August	8,923	8,936	0.1
September	6,312	6,548	3.7
October	3,796	3,718	-2.1
November	1,083	1,099	1.5
December	876	898	2.5
Total year	45,876	45,982	0.2

Contribution of tourism to the economy		1988
Contribution to GNP (Mio DR)		543,000
Contribution to employment (units)		335,000
% of total GNP		7.3
% of total employment		7.2

Tourism in the balance of payments (Mio DR)	1988	1989	Variation % 1989/88
Receipts	345,600	324,700	-6.0
Expenditure	104,900	133,300	27.1
Balance sheet	240,700	191,400	-20.5
<i>Share of 'Travel' receipts in exports of goods and services</i>	19.6%	16.3%	
<i>Share of 'Travel' expenditure in imports of goods and services</i>	4.3%	4.3%	

generating countries, or in the economic factors affecting international tourism demand and expenditure, or in the international geopolitical structure), seem to be slowly shifting the world tourism axis (in a geographical sense), with Mediterranean tourism declining in favour, not of other specific areas, but of a greater geographical distribution of tourism demand.





SPAIN

The first slowdown since the 1960s

Spain is a world leader in the tourist industry and the main destination for European tourists travelling to the Mediterranean.

According to the WTO, Spain is visited by 35 million tourists per year. This amounts to 9.1% of world tourism and accounts for 3.6% of total expenditure on tourism. Spain's hotels account for 5.2% of world capacity and this figure would be even higher were it to include all available types of tourist accommodation (holiday apartments, camp-sites, etc.)

1989 marked the start of a slowdown in the growth of European mass tourism in Spain - the first the country has registered since the 1960s.

The causes for the slowdown are:

- a decrease in demand (high mortgage rates in the UK, unusual weather conditions, etc;)

- competitive package tours to new destinations (Tunisia, Turkey, Morocco, Yugoslavia, the Caribbean);

- deterioration of Spain's tourist resorts (highrise buildings, over-concentration, a surplus of available accommodation, noisiness, etc.).

In addition, the tourist industry depends, to a large extent, upon the efforts of European tour operators. With the increase in non-

hotel accommodation (holiday apartments), we are seeing an increase in tourists travelling on a 'seat only' or 'timeshare' basis.

The Spanish tourist industry has proposed a series of measures to be adopted by both the government and the private sector in an attempt to alleviate these prob-

Total nights spent by tourists in hotel accommodation establishments (1 000)			
Months	1988	1989	Variation % 1989/88
January	6,890	6,783	-1.5
February	7,057	6,927	-1.8
March	8,469	8,868	4.7
April	9,789	8,866	-9.4
May	12,970	12,769	-1.5
June	14,493	13,118	-9.5
July	17,201	16,191	-5.9
August	19,781	19,420	-1.8
September	16,059	14,847	-7.5
October	11,960	11,232	-6.1
November	6,767	6,573	-2.9
December	5,904	5,832	-1.2
Total year	137,338	131,425	-4.3

lems. These measures include:

- Legislation aimed at protecting the environment (the Coastal Act, etc.).

- Regulating non-hotel accommodation (apartments, timeshare arrangements, etc.).

- Diversifying the type of tourism available (sunshine and beaches, cultural activities, sports, etc.).

- Promoting an image of quality tourism.

- Preparing for the near future when air transport will be deregulated, reservation systems computerized, and there will be free circulation of people and capital, a harmonized tax system, etc.

- Training personnel and promoting customer services.

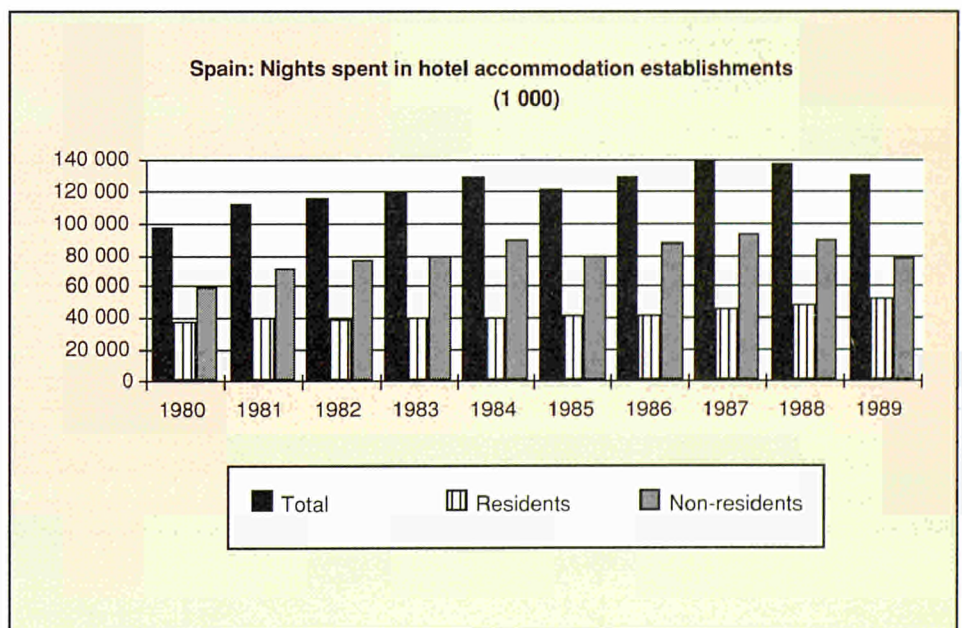
A total of 54 057 355 people visited Spain in 1989, 0.2% less than in 1988. Approximately 35 million of these visitors were tourists. Practically all the major countries registered a fall in the number of tourist arrivals to Spain: Germany (- 1.7%), France (- 0.8%), United Kingdom (- 3.9%) and Belgium (- 0.6%). These were not compensated for by the increases registered in the number of tourists from Italy (+ 13.4%), the Netherlands (+ 1.5%) and Sweden (+ 1.6%).

The 1989 slowdown in tourism

was also evident in the number of foreign travellers using airports in the country's leading tourist areas: Palma (Majorca) 4 523 338 (+ 0.9%); Malaga 1 886 717 (- 2.7%), Santa Cruz de Tenerife

(Canary Islands) 1 840 919 (- 0.4%); Las Palmas (Canary Islands) 1 579 194 (- 10.6%); Alicante 1 034 224 (- 5.6%) and Ibiza 969 358 (- 9.3%).

Nights spent by non-resident tourists in hotel accommodation establishments (1 000)			
Months	1988	1989	Variation % 1989/88
January	4,302	3,844	-10.7
February	4,173	3,853	-7.7
March	4,908	4,396	-10.4
April	5,839	4,966	-15.0
May	9,178	8,555	-6.8
June	10,275	8,662	-15.7
July	11,767	10,388	-11.7
August	12,312	11,335	-7.9
September	10,810	9,351	-13.5
October	8,004	6,994	-12.6
November	3,639	3,124	-14.2
December	3,144	2,835	-9.8
Total year	88,351	78,301	-11.4





Figures on the number of overnight stays in hotels reveal an increase for resident tourists. This is due both to business trips, which include overnight stays in urban hotels, and to increased holiday travel by Spaniards.

Domestic tourists tends to use non hotel accommodation (apartments and vacation homes) which are difficult to quantify because most of this accommodation is not officially registered. An estimate for 1988 shows that

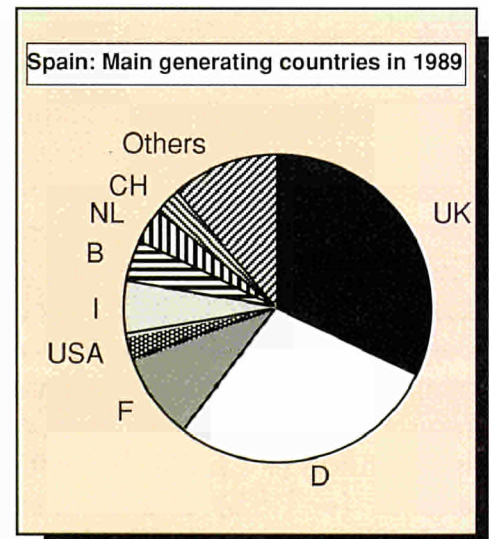
49 million nights were spent by Spanish residents in hotels and 713 million in non-hotel accommodation.

As far as foreigners are concerned, the number of overnight stays in hotels registered a decline due to the slowdown in tourism and to an increasing tendency to opt for non-hotel accommodation.

There is a heavy concentration of British and German nationalities among Spain's foreign tourists. Tourist destinations are largely concentrated as well (the Balearic Islands, the Canary Islands, Catalonia, Andalusia and the area of Valencia) and the tourist influx is highly seasonal (summer). The explanation for this is that tourists to Spain are motivated by the prospect of 'sun, sea and sand'.

Nights spent by resident tourists in hotel accommodation establishments (1 000)			
Months	1988	1989	Variation % 1989/88
January	2,588	2,939	13.6
February	2,884	3,074	6.6
March	3,561	4,472	25.6
April	3,950	3,900	-1.3
May	3,791	4,214	11.2
June	4,218	4,456	5.6
July	5,435	5,803	6.8
August	7,470	8,085	8.2
September	5,248	5,496	4.7
October	3,956	4,238	7.1
November	3,128	3,449	10.3
December	2,760	2,997	8.6
Total year	48,987	53,124	8.4

Nights spent by non-resident tourists in hotel accommodation establishments			
Main generating countries	1988 (Jan.-Oct.)	1989 (Jan.-Oct.)	Variation % 1989/88
United Kingdom	28,732,681	23,482,253	-18.3
Germany	23,175,333	20,262,626	-12.6
France	6,671,657	6,688,173	0.2
Italy	4,338,672	4,321,599	-0.4
Belgium	3,385,112	3,177,920	-6.1
Netherlands	3,130,766	2,659,379	-15.1
Switzerland	2,265,352	2,043,203	-9.8
USA	1,573,148	1,641,399	4.3
Denmark	1,140,485	945,777	-17.1
Sweden	1,035,683	983,195	-5.1
Others	6,119,136	6,136,748	0.3
Total	81,568,025	72,342,272	-11.3



It is difficult to interpret the phenomenon of tourism in Spain due to the existence of a tremendous number of unregistered apartments, where tourists are accommodated and tourist income is generated, but not reflected in official statistics.

In 1988 it was estimated that there were 10.6 million bed-places in

non-registered tourist apartments, 0.3 million bed-places in registered apartments and 858 officially registered camp-sites compared to 0.9 million bed-places in hotel accommodation.

In the same year it was estimated that foreign tourists spent 287.6 million nights in non-hotel accommodation and 27.3 million nights

at camp-sites against 88.3 million nights in hotel accommodation.

Spain also has facilities for winter tourism in 32 ski resorts with accommodation for 87 000 visitors. Other tourist facilities include mountain resorts, spas, recreational ports and yacht clubs, golf clubs, aquatic parks, riding, hunting and fishing, etc.

Foreign tourism in Spain: Seasonal and regional distribution	
Region	% by tourist areas
Balearic Islands	35.9
Canary Islands	19.6
Catalonia	16.9
Andalusia	12.5
Greater Valencia	9.0
Other areas	6.1
Quarter	% by season
January - March	14.3
April - June	22.2
July - September	44.7
October - December	18.8

Tourists and overnight stays at camp-sites, 1988		
	Tourists	Overnight stays
Spaniards	914,926	6,099,424
Foreign tourists	666,126	4,333,787
Germany	167,281	1,183,505
Benelux	127,093	1,024,773
France	154,427	782,404
United Kingdom	59,067	623,005
Scandinavia	15,673	108,276
Rest of Europe	118,720	560,770
USA, Canada	4,203	15,680
Rest of America	2,471	9,742
Other countries	7,171	25,632
Total	1,581,052	10,433,211

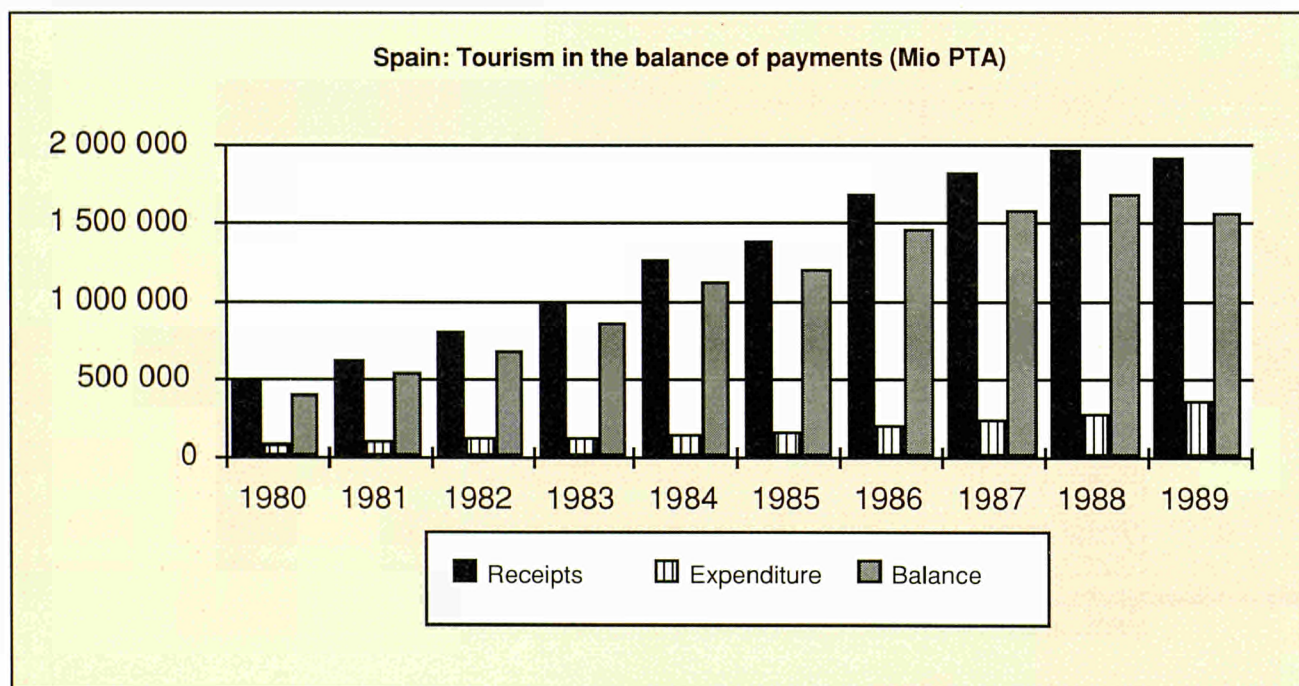
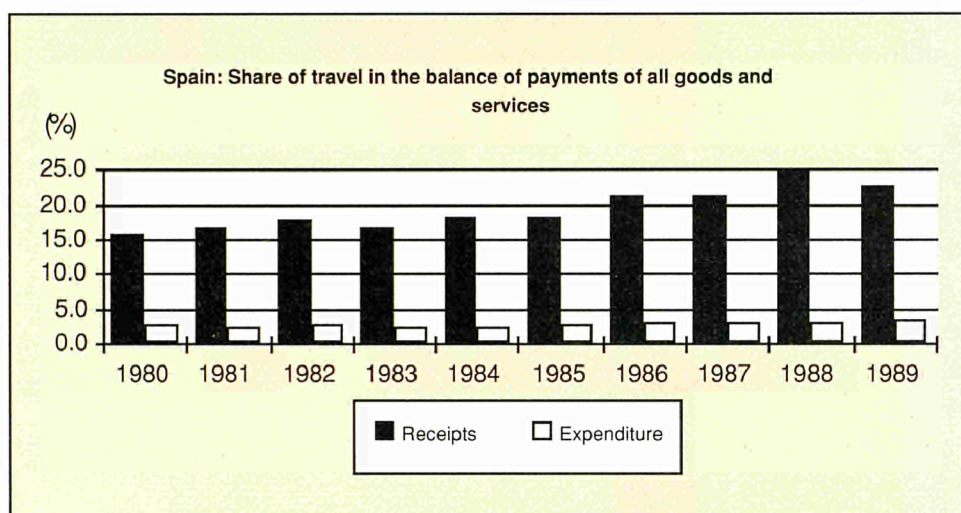


Spain's income from international tourism amounted to US\$ 16 174 billion in 1989, down 3.1% from 1988. Spanish expenditure on tourism amounted to US\$ 3.09 billion - an increase of 26.2%.

Travel receipts account for 22.7% of exports of all goods and services (24.6% in 1988)

Tourism makes a significant contribution to the Spanish balance of payments. Conversely, travel expenditure represents only 3.5% of imports of goods and services, a slight increase in comparison with 1988 (3.3%).

Tourism in the balance of payments (PTA billion)	1988	1989	Variation % 1989/88
Receipts	1,961	1,924	-1.9
Expenditure	286	365	27.4
Balance sheet	1,675	1,560	-6.9
Share of 'Travel' receipts in exports of goods and services	24.6%	22.7%	
Share of 'Travel' expenditure in imports of goods and services	3.3%	3.5%	



46% of all Spaniards take vacations. The average length of a holiday trip is 7.8 days, although the average for summer vacation trips is 15 days.

23 301 863 Spaniards travelled abroad in 1989, up 22.7% from

1988.

However, the majority of them spent less than 24 hours abroad.

The breakdown of time spent abroad by Spanish travellers is as follows:

> 30 days7.3%
 15-30 days30.9%
 11-14 days12.4%
 7-10 days33.4%
 4- 6 days24.0%

Pesetas spent on tourism registered a 27.43% increase in 1989, totaling PTA 365 million. This reflects the increased tendency of Spaniards to holiday abroad.

Tourism accounts for 9.4% of Spain's gross domestic product and provides direct or indirect employment for 1.23 million people, making the tourist industry a strategic part of the national economy.

Contribution of tourism to the economy	1988
Contribution to GNP (Mio PTA)	3,727,476
Contribution to employment (units)	1,226,500
-- direct employment	686,500
-- indirect employment	540,000
% of total GNP	9.4
% of total employment	9.3



FRANCE

Bicentenary boosts tourism to record heights

1989 has been an exceptional year for tourism, which plays a very important role within the national economy (equal to agriculture) particularly as an income-generating activity in the Balance of payments.

The very favourable results obtained in 1989 could be explained by a combination of factors, including: the Commemoration of the Bicentenary of the French Revolution, the mild climate, continued economic growth in the major industrial countries and the French promotion policy, (particularly the restructuring of *Maison de la France*, which is responsible for promoting French tourism.)

On the basis of the first nine months of 1989 overnight stays by non-resident tourists in registered hotels increased by 20.2% in comparison with the previous year. We can estimate that more than 51 million nights were spent by non-resident tourists against 42.5 million in 1988.

Among the main generating countries, the British Isles (United Kingdom and Ireland) rank top, with 8.6 million overnight stays, over-

Months	1988	1989	Variation % 1989/88
1st quarter	5,878,167	7,821,618	33.1
2nd quarter	12,055,034	15,020,073	24.6
3rd quarter	16,904,280	19,033,938	12.6
4th quarter ²⁾	7,683,878	9,236,237	20.2
Total year	42,521,359	51,111,866	20.2

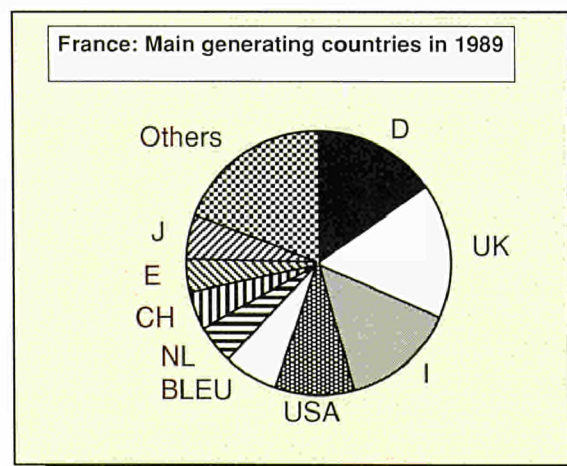
¹⁾ Not including Pays de la Loire.

²⁾ For 1989, estimate based on the first nine months.

Main generating countries	1988	1989	Variation % 1989/88
Germany	6,989,604	7,667,596	9.7
United kingdom / Ireland	6,822,072	8,575,345	25.7
Italy	5,660,668	7,138,102	26.1
USA	3,958,760	5,154,306	30.2
BLEU	3,285,918	3,266,203	-0.6
Netherlands	2,290,505	2,395,868	4.6
Switzerland	2,024,718	2,304,129	13.8
Spain	1,809,042	2,235,976	23.6
Japan	1,706,665	2,855,251	67.3
Others	7,973,407	9,519,090	19.4
Total	42,521,359	51,111,866	20.2

¹⁾ For 1989, estimate based on the first nine months.

²⁾ Not including Pays de la Loire.



taking Germany which generated 7.7 million nights. Italy, the USA, Belgium and Luxembourg follow. Spain generates smaller tourist flows in hotels but ranks ninth at

approximately the same level as the Netherlands and Switzerland, even if behind Japan. Japan recorded the greatest growth in 1989 (+67.3%) passing

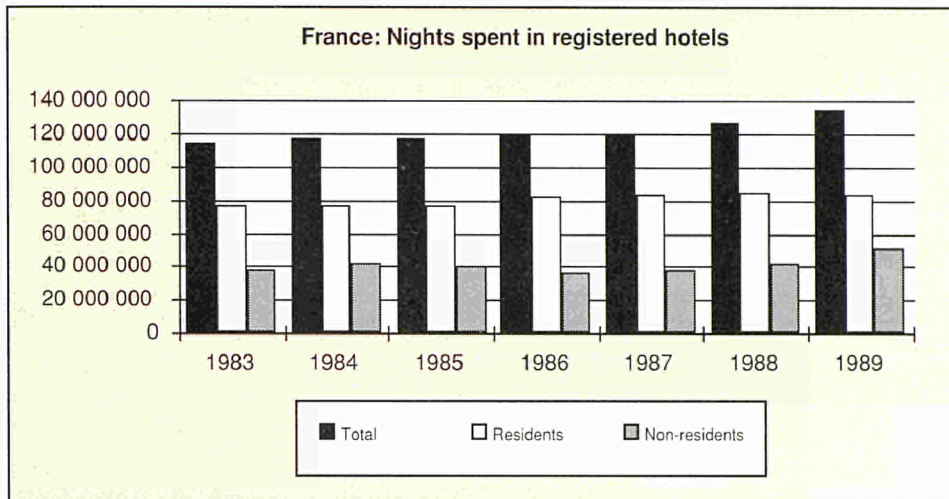
from the ninth to the sixth rank.

In the Île de France region, during the first half of 1989, the hotel sector recorded an increase in arrivals of 33% and in the number of overnight stays of 31%. In July 1989 an increase of 63% in overnight stays was recorded in comparison with July 1988.

Nights spent by Italian and Japanese tourists registered the greatest growth in the Île de France region: +68% for Italy and +84% for Japan in the first six months. In July 1989 Italian guests numbered twice as many as in the same month of 1988 and Japanese guests three times as many.

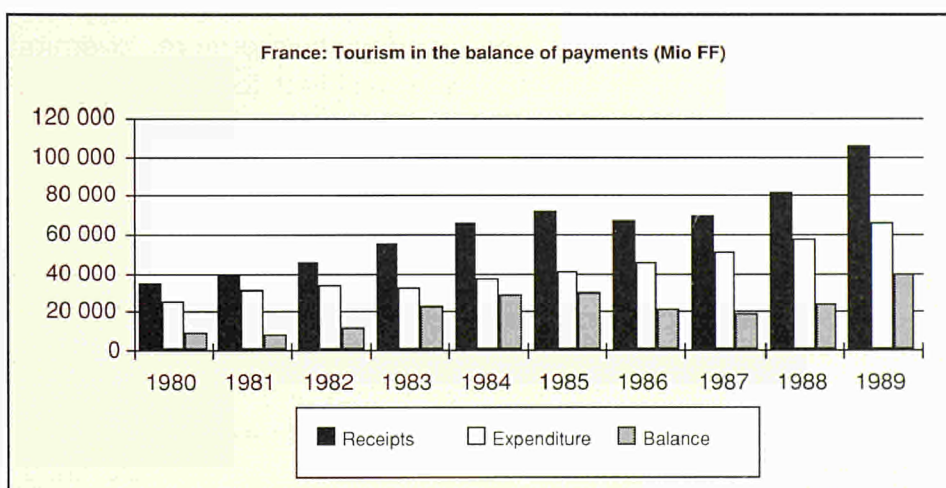
Other indications of these trends can be found in the activity of travel agencies (+ 11% on the annual trend); evolution of the turnover of hotels, cafés and restaurants for the first five months of the year (+ 9% in comparison with the same period for the previous year); increases in the tourist flows registered by the Paris Tourist Office; visits to historical monuments in August reached a record 800 000 visitors. Since 1985 this figure varied from 500 000 to 600 000 per month.

The sharp rise in tourism for France is shown by the estimate of the balance sheet for the travel item in the balance of payments. At the end of 1989, receipts reached FF 105.7 billion (+28.7%) and expenditure FF 66.4 billion (+14.7%) with a balance of FF 39.3 billion (+62%).



Tourism in the balance of payments (Mio FF)	1988	1989 ¹⁾	Variation % 1989/88
Receipts	82,097	105,656	28.7
Expenditure	57,852	66,371	14.7
Balance sheet	24,245	39,285	62.0
Share of 'Travel' receipts in exports of goods and services	n.a.	5.5	
Share of 'Travel' expenditure in imports of goods and services	n.a.	3.5	

¹⁾ December estimated.





At the average rate of exchange in 1989, receipts could be estimated at US\$ 16,6 billion.

This extraordinary result follows the positive results recorded in 1988, when the balance was more than FF24 billion, representing a rise of 19% in comparison with the previous year.

An analysis of receipts by generating market in the first half of 1989 shows a sharp increase on the previous year in tourism from the Iberian peninsula, Benelux and the British Isles.

These improvements should be analysed with caution, however, taking into account that similar developments were already recorded in the first half of 1987 and 1988 without a corresponding result for the annual average. With regard to the main geographical regions, the rise in receipts recorded in the first half of 1989 in comparison with the previous year will be + 47% for the southern EC countries, + 35% for the northern EC countries and + 25% for North America.

On the basis of the first nine months of 1989, we can estimate that overnight stays of resident tourists in registered hotels fell slightly (-0.6%) in comparison with the previous year. The global result for 1989 should be 84.7 million overnight stays against 85.2 million in 1988.

If we analyse data for each quarter of the year we can observe that

Nights spent by resident tourists in hotel accommodation establishments ¹⁾			
Months	1988	1989	Variation % 1989/88
1st quarter	16,986,121	17,988,302	5.9
2nd quarter	22,471,885	22,719,076	1.1
3rd quarter	29,657,655	27,967,169	-5.7
4th quarter ²⁾	16,117,227	16,020,524	-0.6
Total year	85,232,888	84,695,071	-0.6

¹⁾ Not including Pays de la Loire.

²⁾ For 1989, estimate based on the first nine months.

Total nights spent by tourists in hotel accommodation establishments ¹⁾			
Months	1988	1989	Variation % 1989/88
1st quarter	22,864,288	25,809,920	12.9
2nd quarter	34,526,919	37,739,149	9.3
3rd quarter	46,561,935	47,001,107	0.9
4th quarter ²⁾	23,801,105	25,256,761	6.1
Total year	127,754,247	135,806,937	6.3

¹⁾ Not including Pays de la Loire.

²⁾ For 1989, estimate based on the first nine months.

this result reflects opposing trends: in the first quarter there was an increase of 6%, while in the third quarter there was a fall of the same percentage. A slight rise was recorded in the second quarter (+1.1%) and a slight decline (-0.6%) estimated for the final quarter.

According to the latest available data, little more than 27% of French people went on holiday during the winter season of 1988/1989.

This rate (lower than that of the previous year), confirms that, as during the previous season, winter holidays are becoming less popular.

The rate of departures for winter resorts, which was static during the previous two seasons, dropped to approximately 8%.

This fall can be attributed in part to unfavourable weather conditions.

The medium length of winter holidays continues to decrease at a slow pace (less than 14 days) as for skiing holidays (less than nine days).

The data show a decrease in the number of arrivals and overnight stays related to winter holidays, particularly relevant for skiing holidays: arrivals for skiing holidays declined by 12%, in comparison with the previous year, while the number of arrivals did not vary, as for other types of holiday. Furthermore, overnight stays related to skiing activities decreased by 14%, while elsewhere these fell by only 4%.

The choices made by French holiday-makers confirm the stability recorded during the last few years: half of the holidays take place in mountain and country resorts; of these more than half take place at

Residents' tourism	1988	1989
Holiday departure rate (%)		
Winter 1):		
total	28.2	27.3
of which abroad	5.1	5.1
Summer 2):		
total 3)	55.5	56.5
of which abroad	12.6	13.4
Total year ³⁾	59.5	60.5
Number of holiday nights spent in the country ³⁾	745,446,000	730,200,000
Number of holiday nights spent abroad ³⁾	184,323,000	198,500,000

1) From 1 October of the year n-1 to 30 April

2) From 1 May to 30 September

3) Provisional data for summer 1989

Contribution of tourism to the economy	1988
Contribution to GNP	
Consumption (direct) (Mio FF)	403.0
Consumption (direct and indirect) (Mio FF)	510.2
Contribution to employment (Horeca) (1 000)	720.8
% of total GNP (direct and indirect)	9.0
% of total GNP (direct)	7.1
% of total employment (Horeca)	3.3

relatives' and friends' homes. Bank and school holidays continue to exert a considerable influence on the choice of departure dates.

Finally, more than four-fifths of the holidays spent in France took place without the intervention of intermediaries. These were used for more than half the foreign travel undertaken.

As regards summer holidays in 1989, available data show an increase in the number of stays of 4.8% and in the number of overnight stays of 1.7%, confirming the trend in reducing the average length of stay. The departure rate should increase by 1% reaching 60.5% in 1989.

Tourist consumption (direct and indirect) represented 9% of GNP in 1988, the same percentage as in 1986 and 1987. The percentage growth from 1977 to 1983 has a maximum value of 9.5%, though the trend is reversed in the following years.

Direct tourist consumption represents 7.1% of GNP in 1988 after having attained a maximum value in 1983 of 7.5%.



IRELAND

Good results for international tourism

Following positive results for international tourism in 1988, Ireland recorded high growth rates in 1989.

The growing demand for 'green' destinations, coupled with a promotional campaign directed at foreign markets, bodes well for tourist activity in the economy both now and in the near future.

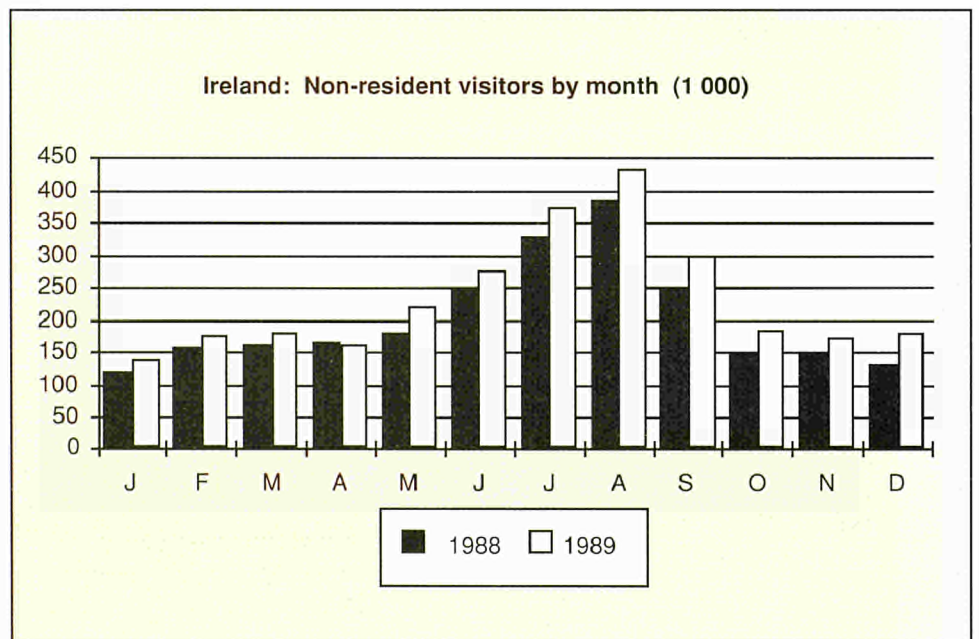
The main features of tourism in 1988/89 were:

- Record air-transport arrivals and departures especially Ireland-United Kingdom but also the opening up of new transatlantic routes, particularly between Dublin and Chicago.

- The number of visits to Ireland by non-residents increased 1988/89 by 15.3% to 2.8 million. Significant increases were recorded during the months of May (+22.8%), November (+20%) and December (+36.6%).

This emphasises the fact that the characteristics of tourism in Ireland favour a regular distribution of tourist flows throughout the year.

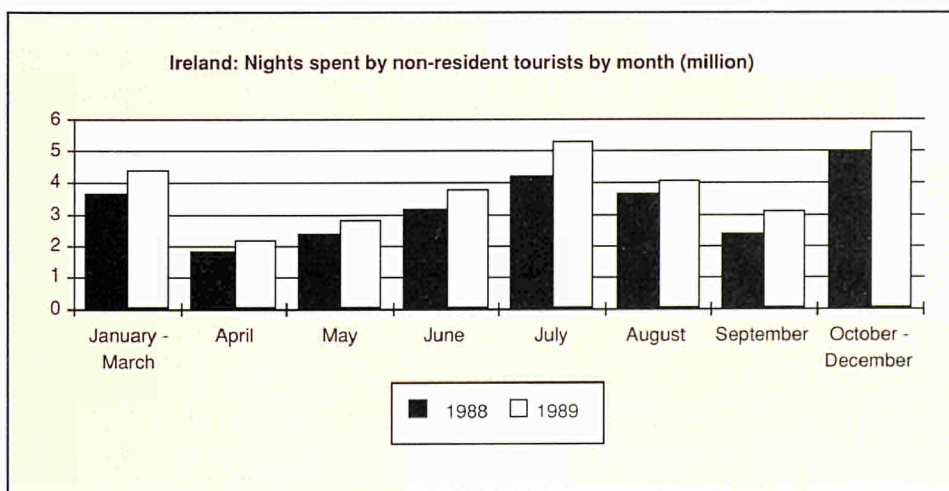
Non-resident visitors to Ireland			
Number of visits (1 000)			
Months	1988	1989	Variation % 1989/88
January	122	140	14.8
February	158	175	10.8
March	160	180	12.5
April	166	163	-1.8
May	180	221	22.8
June	247	278	12.6
July	330	372	12.7
August	384	434	13.0
September	250	299	19.6
October	152	182	19.7
November	145	174	20.0
December	131	179	36.6
Total year	2,425	2,797	15.3



Non-resident visitors to Ireland (1 000)			
Main generating countries	1988	1989 ¹⁾	Variation % 1989/88
United Kingdom	1,508	1,702	12.9
USA	385	388	0.8
Canada	34	42	23.5
France	111	139	25.2
Germany	113	156	38.1
Netherlands	38	47	23.7
Other European countries	146	208	42.5
Others	90	115	27.8
Total	2,425	2,797	15.3

¹⁾ Preliminary data.

Nights spent by non-resident tourists in accommodation establishments			
Months	1988	1989	Variation % 1989/88
January - March	3,667,720	4,371,640	19.2
April	1,833,860	2,185,820	19.2
May	2,357,820	2,810,340	19.2
June	3,143,760	3,747,120	19.2
July	4,191,680	5,308,420	26.6
August	3,667,720	4,059,380	10.7
September	2,357,820	3,122,600	32.4
October - December	4,977,620	5,620,680	12.9
Total year	26,198,000	31,226,000	19.2



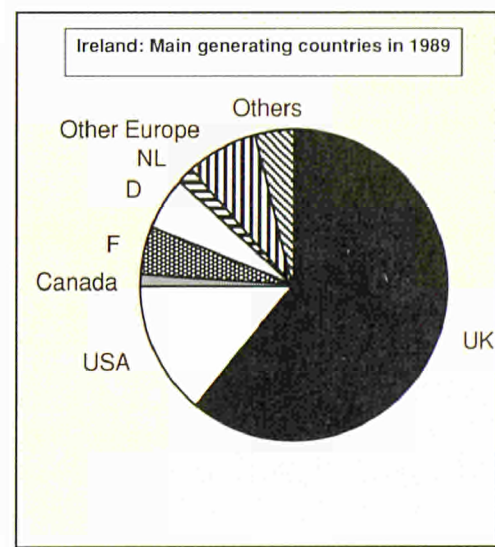
- Britain continues to be by far the largest tourist generator but significant increases are registered for Europe, especially Germany (+38.1%).

Other countries particularly those with ancestral connections with Ireland such as the USA, are important sources of tourism even if visitors from the USA increased by only 0.8% in 1989.

- 31.2 million nights were spent in Ireland by non-residents in 1989 with an increase of 19.2% over 1988. The highest growth rates were recorded in July (+26.6%) and September (+32.4%).

- Total tourism revenue rose by 16% 1988/89 from IRL 1153 to IRL 1 335 million.

- Tourism receipts in the Balance of payments grew by 17.6% from 841 to 989 million. Tourism revenue accounts for 6.3% of all exports.





- Tourism expenditure in the Balance of payments is estimated to increase by 10.5% from IRL 632 to 698 million. Tourism expenditure accounts for 7.3% of all imports.

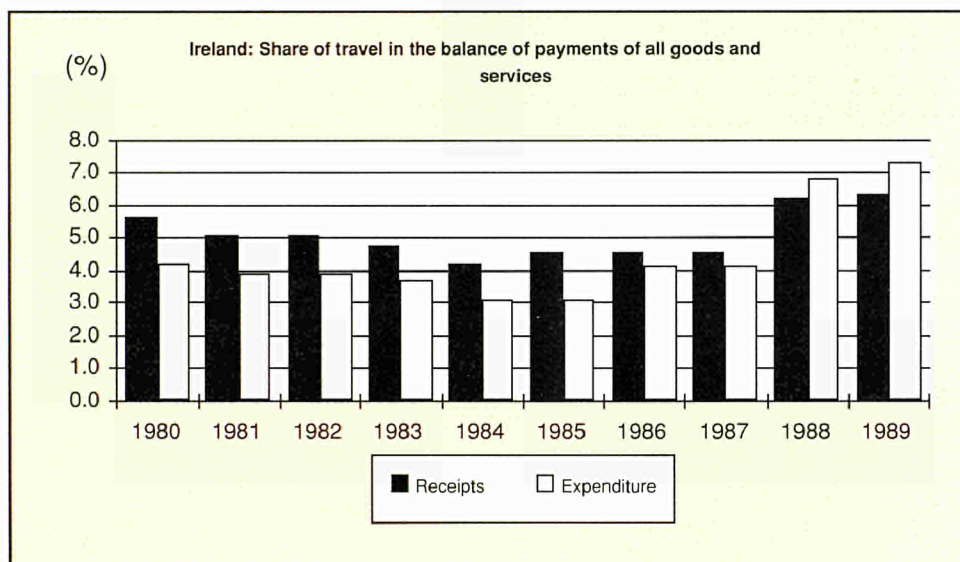
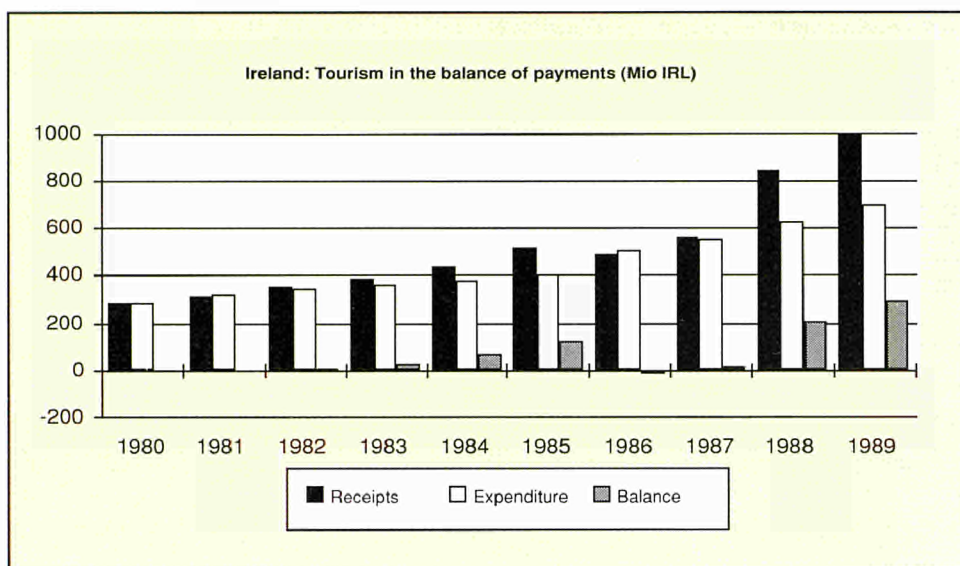
- Hotel building boomed especially in Dublin; 20 hotels being constructed in the more up-market categories, providing specialised and/or leisure facilities.

- A considerable extension of the tourist season was recorded. Many major hotels (formerly seasonal) now operate for 52 weeks of the year.

In 1989 56% of the Irish adult population took holidays against 55% in 1985. 38% of the Irish population took domestic holidays (24% long holidays and 21% short holidays) with a 5.6% increase with respect to the previous year. 27% of the adult Irish population took holidays abroad: a 10% decline compared to 1988.

In 1988 holiday expenditure by Irish residents was IRL 730.2 million, an 18.3% increase in comparison with the previous year. Irish residents spent 70.3% of total holiday expenditure abroad; in 1988 IRL 513.5 million was spent during holidays abroad whereas 216.7 was spent on domestic holidays.

Total revenue from foreign and domestic visitors amounted to IRL 1 153 100 in 1988. This ac-



Tourism in the balance of payments (Mio IRL)	1988	1989	Variation % 1989/88
Receipts	841	989	17.6
Expenditure	632	698	10.5
Balance sheet	210	291	38.6
Share of 'Travel' receipts in exports of goods and services	6.2%	6.3%	
Share of 'Travel' expenditure in imports of goods and services	6.8%	7.3%	

Holiday expenditure by Irish residents (Mio IRL)			
	1987	1988	Variation % 1989/88
Home long holidays (+ 4 nights)	107.9	124.4	15.3
Home short holidays (1 - 3 nights)	60.8	92.3	51.8
Holidays abroad	448.7	513.5	14.4
Total holidays	617.4	730.2	18.3

Residents' tourism	1988	1989	Variation % 1989/88
Holiday departure rate:			
in the country	55	56	1.8
abroad	36	38	5.6
	30	27	-10.0
Number of holiday visits spent in the country	2,362,000	2,645,000	12.0
Number of holiday visits spent abroad	1,203,000	N.A.	N.A.

counted for 6.2% of GNP in that year. This figure relates only to the direct effects of tourist expenditure and does not include the indirect or ripple effects of further spending in the economy through the multiplier.

In 1988 it can be estimated that tourist activity supported 69 000 job equivalents. Of these, approximately 44 000 were supported by State expenditure, the remainder by the private sector. Employment supported by the sector represents 6.3% of the total workforce, 7.5% of non-agricultural employment and 11% of all those employed in service activities.

Number of holiday visits by Irish residents (1 000)				
	1987	1988	1989	Variation % 1989/88
Number of holiday visits spent in Ireland (+ 4 nights)	917	1118	1294	15.7
Number of holiday visits spent in Ireland (1-3 nights)	911	1244	1351	8.6
Number of holiday visits spent abroad	1069	1203	n.a.	n.a.
Total holiday visits	2897	3565	n.a.	n.a.

Contribution of tourism to the economy	1988
Contribution to GNP (IRL)	1,153,100
Contribution to employment	69,000
% of total GNP	6.2
% of total employment	6.3



ITALY

Foreign arrivals fall while more residents travel abroad

In 1989, following the trend of the last few years, Italian tourism supply has not been keeping pace with increases in world, European and Italian demand.

The main indicators of tourism demand have, during the last few years, revealed a steady growth in Italian outbound tourism and, viceversa, a decline in tourist flows into the country.

Consequently, a sharp drop in the active tourism balance was recorded. In 1989 this trend was confirmed: Italy's importance as a receiving country continues to decline.

In the early 1980s Italy was the leading country for international tourist arrivals. Presently Italy has risen to second and fourth place respectively and seems likely to become an important tourism-generating country.

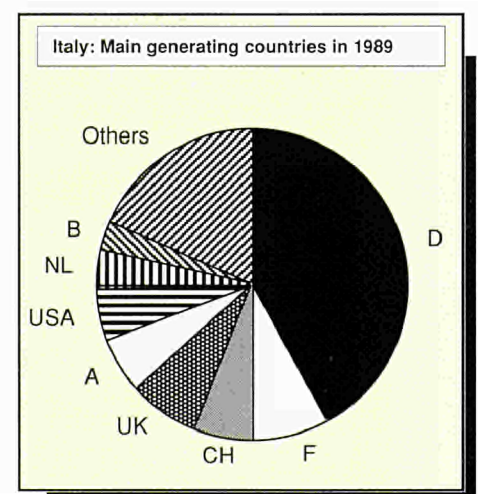
A first evaluation of the data available for 1989 shows:

- a reduction of 593 000 arrivals of visitors at the frontiers (-1.1%), particularly in the first ten months

Arrivals of visitors at the frontiers (1 000)			
Months	1988	1989	Variation % 1989/88
January	2,949	2,613	-11.4
February	2,984	2,627	-12.0
March	3,644	3,871	6.2
April	4,020	3,640	-9.5
May	4,667	5,109	9.5
June	5,271	4,827	-8.4
July	7,948	7,623	-4.1
August	8,452	7,926	-6.2
September	5,511	5,542	0.6
October	4,079	4,699	15.2
November	3,029	3,205	5.8
December	3,136	3,415	8.9
Total year	55,690	55,097	-1.1

of the year and during the summer season, and an upturn in the last month of 1989. The drop in foreign tourist arrivals is mainly due to the fall in Swiss (-13.3%), German (-3.3%) and Austrian (-1.5%) visitors. This was not offset by an improvement in the flows of visitors coming from all other countries: Canada (+19.5%), Australia (+20.7%), Norway (+16.2%) and Japan (+18.7%), nor by tourist flows coming from the USA, which remained almost unchanged;

- a reduction of about 5.8 million in overnight stays of non-resident



Nights spent by non-resident tourists in accommodation establishments (1 000)			
Main generating countries	1988	1989	Variation % 1989/88
Germany	39,498	36,353	-8.0
France	6,838	6,940	1.5
Switzerland	6,297	5,363	-14.8
United Kingdom	6,132	6,211	1.3
Austria	5,572	5,151	-7.6
USA	4,924	4,706	-4.4
Netherlands	3,557	3,413	-4.0
Belgium	2,574	2,567	-0.3
Spain	1,896	1,943	2.5
Sweden	1,434	1,387	-3.3
Denmark	1,253	1,212	-3.3
Japan	1,190	1,328	11.6
Others	11,122	9,912	-10.9
Total	92,287	86,486	-6.3

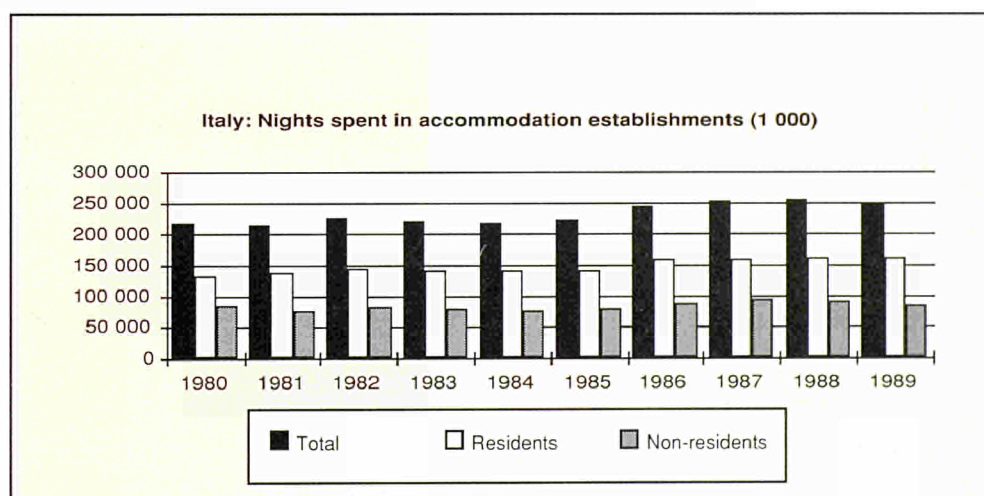
tourists in registered accommodation establishments (-6.3%): -2.8 million in hotels and similar establishments (-4.4%) and -3 million in supplementary accommodation establishments (-13.8%);

- a further reduction of about 1.2 million overnight stays of resident tourists (-0.8%), almost all of which were recorded in supplementary accommodation establishments ;

Nights spent by non-resident tourists in accommodation establishments (1 000)			
Months	1988	1989	Variation % 1989/88
January	2,195	2,177	-0.8
February	3,163	2,774	-12.3
March	4,550	5,183	13.9
April	5,430	4,802	-11.6
May	8,288	9,298	12.2
June	11,150	10,210	-8.4
July	19,409	15,768	-18.8
August	16,321	14,002	-14.2
September	11,720	11,351	-3.1
October	6,345	6,513	2.6
November	1,976	2,449	23.9
December	1,740	1,960	12.6
Total year	92,287	86,487	-6.3

- a slight decrease in employment in accommodation establishments (-1 400 units, i.e. -0.4%) recorded in supplementary accommodation establishments given no change in the capacity of accommodation establishments;

- a severe worsening of the 1989





Nights spent by total tourists in accommodation establishments (1 000)			
Months	1988	1989	Variation % 1989/88
January	8,778	8,909	1.5
February	10,226	9,195	-10.1
March	12,654	14,336	13.3
April	14,670	13,231	-9.8
May	16,115	17,310	7.4
June	25,862	24,621	-4.8
July	49,846	45,106	-9.5
August	61,773	58,544	-5.2
September	27,431	27,112	-1.2
October	13,679	13,964	2.1
November	7,028	8,024	14.2
December	7,960	8,623	8.3
Total year	256,022	248,975	-2.8

Nights spent by resident tourists in accommodation establishments (1 000)			
Months	1988	1989	Variation % 1989/88
January	6,583	6,732	2.3
February	7,063	6,421	-9.1
March	8,104	9,153	12.9
April	9,240	8,429	-8.8
May	7,827	8,012	2.4
June	14,712	14,411	-2.0
July	30,437	29,338	-3.6
August	45,452	44,542	-2.0
September	15,711	15,761	0.3
October	7,334	7,451	1.6
November	5,052	5,575	10.4
December	6,220	6,663	7.1
Total year	163,735	162,488	-0.8

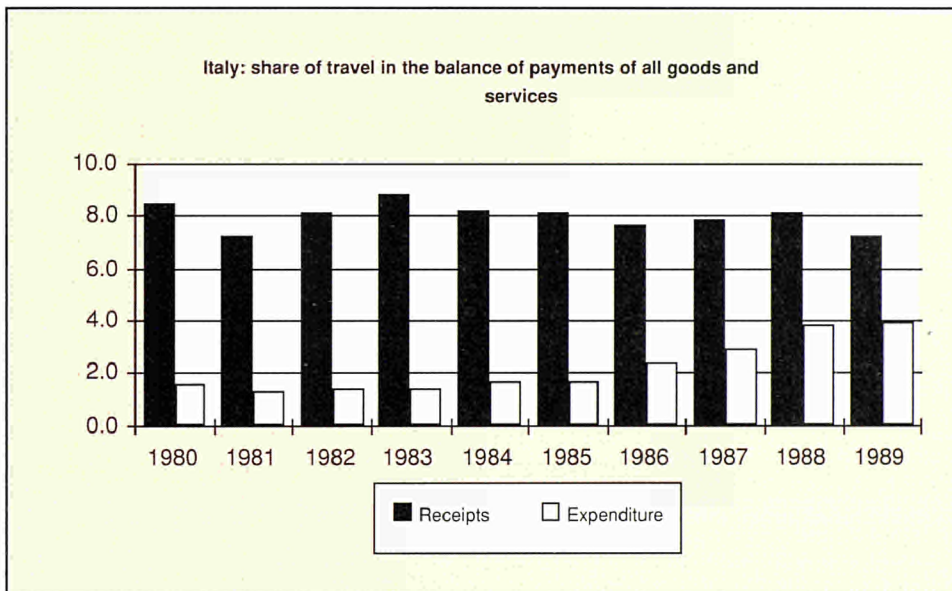
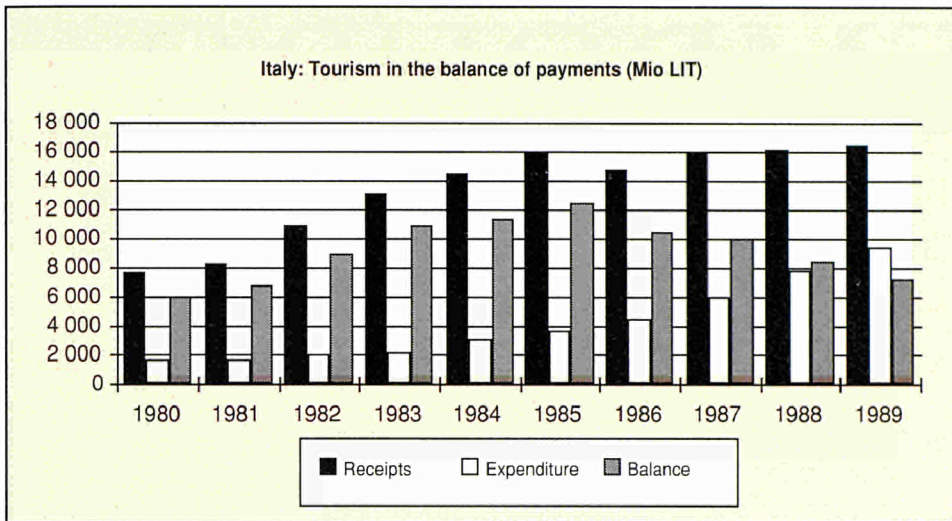
tourism Balance of payments; tourism receipts amount to LIT 16 443 million, i.e. 1.9% higher than in 1988. Tourism expenditure continued to increase rapidly, reaching, in 1989, LIT 9 291 million (+19.2% in comparison with 1988).

In the early 1980s, tourism expenditure amounted to 23%-24% of tourism receipts; it currently represents 57%.

Consequently, the active tourism balance in 1989 dropped to LIT 7 151 million, a fall of 14.3% in comparison with the previous year. The tourism balance sheet was worth little more than a third of its value at the beginning of the decade.

The problem for Italian tourism in 1989 originates from structural difficulties related to tourism focused upon good accessibility and hospitality of holiday resorts. This was replaced by tourism in-

Tourism in the balance of payments (LIT billion)	1988	1989	Variation % 1989/88
Receipts	16,144	16,443	1.9
Expenditure	7,795	9,291	19.2
Balance sheet	8,349	7,151	-14.3
<i>Share of 'Travel' receipts in exports of goods and services</i>	8.1%	7.2%	
<i>Share of 'Travel' expenditure in imports of goods and services</i>	3.8%	3.8%	



Contribution of tourism to the economy	1988
Contribution to GNP (LIT billion)	47,692
Contribution to employment (Mio units)	1.482
% of total GNP	4.5
% of total employment	6.4

volving more mobility. These new trends in tourism involve an integrated demand of so-called 'network' services (modes of transport, information, cultural services, etc.). Since Italian tourism supply is not able to meet these requirements effectively, its competitiveness declined.

Furthermore, two adverse factors added to the structural deficiencies causing a serious crisis in the most traditional tourist areas:

- at the beginning of the year the lack of snow seriously reduced tourism in mountain resorts;

- during the summer, the algae and mucilage invasion on the Adriatic coast caused great damage to the tourism economy in an area and in a period particularly important for tourism.

Despite these figures, the Italian tourism industry remains competitive, contributing, both directly and indirectly, about 4.5% to GNP. It creates jobs and incomes for 960 000 people working directly in the tourism field and for 550 000 people working (indirectly) in tourism-related activities.



LUXEMBOURG

Luxembourg city thrives off business tourism

Tourist activity, which was rather weak in 1988, beat all records in 1989 : the success of the tourist season was due chiefly to exceptional climatic conditions.

The statistical data referring to Luxembourg city are only slightly affected by seasonal tourism, the influx of tourists being chiefly for business reasons.

For Luxembourg city the number of arrivals in hotels, guest-houses and inns for this area rose by 8.9% in 1989 compared to 1988. The corresponding number of overnight stays for the same period increased by 17.5%. This resulted in an average length of stay of 1.9 nights.

Globally, the whole accommodation sector of Luxembourg city contributed 26.5% to the national result.

The climatic conditions experienced last year resulted in a spectacular increase in total tourist activity in 1989 of 13.6%.

Data obtained on border arrivals

show Italy, Spain and the United Kingdom to be the most popular tourist destinations. Even so, arrivals at Italian borders were 2.4 times more numerous than those at the Spanish border and 6.8% more than arrivals at UK borders.

The preference shown by Luxemburgers for Spain and the UK since 1980 has, since 1985, been extended to Italian resorts. Data relating to arrivals in accommodation establishments indicate that this positive trend towards

Total nights spent by tourists in accommodation establishments			
Months	1988	1989	Variation % 1989/88
January	49,381	52,021	5.3
February	69,496	66,924	-3.7
March	75,614	107,345	42.0
April	135,553	132,398	-2.3
May	253,958	282,409	11.2
June	224,832	250,532	11.4
July	599,855	757,873	26.3
August	521,411	589,543	13.1
September	177,295	192,976	8.8
October	149,644	149,976	0.2
November	93,243	95,758	2.7
December	78,072	78,584	0.7
Total year	2,428,354	2,756,339	13.5

Nights spent by total tourists in accommodation establishments in Luxembourg city			
	1988	1989	Variation % 1989/88
Total year	622,400	731,357	17.5

Nights spent by resident tourists in accommodation establishments			
Months	1988	1989	Variation % 1989/88
January	11,346	10,257	-9.6
February	12,447	11,063	-11.1
March	15,456	13,734	-11.1
April	20,668	21,915	6.0
May	38,838	39,272	1.1
June	36,607	37,993	3.8
July	42,812	43,524	1.7
August	34,773	35,429	1.9
September	23,094	23,437	1.5
October	20,730	19,604	-5.4
November	16,343	17,763	8.7
December	15,603	13,573	-13.0
Total year	288,717	287,564	-0.4

Nights spent by non-resident tourists in accommodation establishments			
Months	1988	1989	Variation % 89/88
January	38,035	41,764	9.8
February	57,049	55,861	-2.1
March	60,158	93,611	55.6
April	114,885	110,483	-3.8
May	215,120	243,137	13.0
June	188,225	212,539	12.9
July	557,043	714,349	28.2
August	486,638	554,114	13.9
September	154,201	169,539	9.9
October	128,914	130,372	1.1
November	76,900	77,995	1.4
December	62,469	65,011	4.1
Total year	2,139,637	2,468,775	15.4

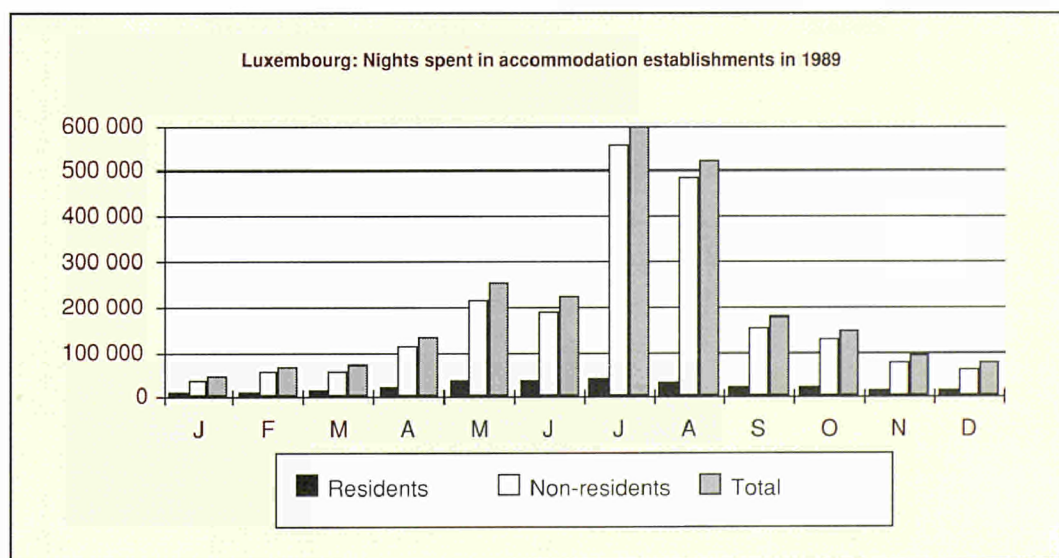
Italian tourism had already begun in 1984 and in absolute terms now matches the level of tourists departing for Switzerland.

Statistics concerning overnight stays reveal a further preference : Belgium, which is comparable, in absolute terms, to tourists choosing the UK as their holiday destination.

In the hotel sector, the number of hotels increased from 388 in 1988 to 399 in 1989.

Capacity increased as a result by only 0.5% from 1988 to 1989.

Total average employment in the restaurant and accommodation sector grew from 8 770 to 9 110, an increase of 3.9%. The impact of tourism on total employment amounts to 5.2%. Employment in general, on the other hand, grew by only 3.1% from 1987 to 1988.



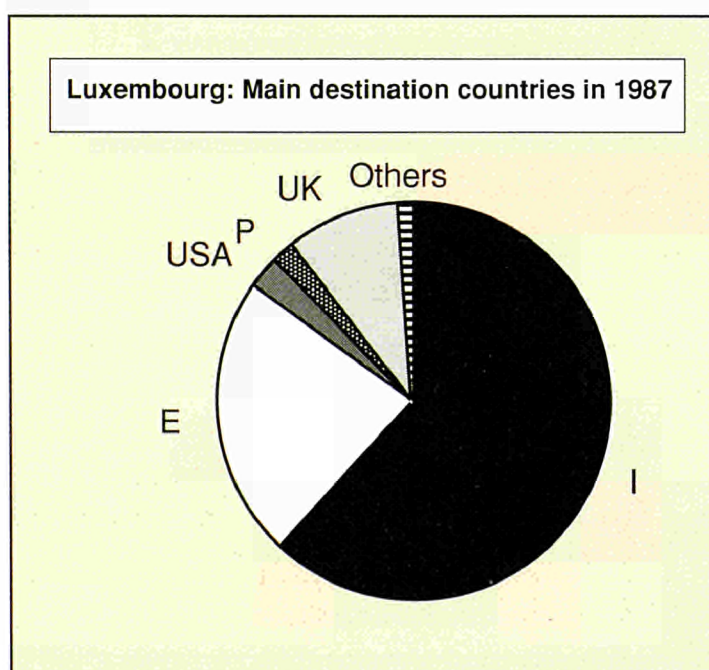


Data obtained for arrivals, over-night stays and average length of stay for the five main tourist regions draw the following conclusions : the Centre, which relates to data for Luxembourg city, recorded an average length of stay in hotels and similar establishments of 2.6 days for residents and 1.8 days for non-residents ; these figures remain roughly the same as those for the previous year.

It is obvious that these data reflect business tourism. A similar situation exists in the other tourist regions with average stays fluctuating within a margin of 1.8 to 4.4 days for all countries for non-residents and residents respectively. The average length of stay of residents in the Moselle region rose to 40 days at camp-sites.

Arrivals at the frontiers of tourists from Luxembourg			
MAIN DESTINATION COUNTRIES	1980	1987	Variation % 87/80
AUSTRIA	104	800	669.2
CANADA	741	1,300	75.4
SPAIN	44,473	70,394	58.3
IRELAND	112	883	688.4
ITALY	183,300	188,828	3.0
JAPAN	249	352	41.4
NEW ZEALAND	24	88	266.7
PORTUGAL	900	6,254	594.9
UNITED KINGDOM	15,000	28,100	87.3
USA	---	7,818	---

Arrivals and nights spent by tourists in hotels and similar establishments in 1989 by tourist region			
Region	Arrivals	Nights spent	Average length of stay
Centre	372,497	688,769	1.8
Ardennes	79,740	204,347	2.6
Moellerdall	64,804	157,728	2.4
Moselle	36,082	117,752	3.3
South	6,292	19,152	3.0
Total	559,415	1,187,748	2.1



**Arrivals and nights spent by tourists at camp-sites
in 1989 by tourist region**

Region	Arrivals	Nights spent	Average length of stay
Centre	47,242	182,858	3.9
Ardennes	101,199	612,426	6.1
Moellerdall	57,068	377,890	6.6
Moselle	13,786	70,946	5.1
South	13,612	19,886	1.5
Total	232,907	1,264,006	5.4

Another striking figure is the average stay of 6.6 days at camp-sites located in Moellerdall. These extremes cause the total average length of stay at camp-sites to rise by 29.1%.

Accommodation establishments capacity

Year	Hotels and similar est.		Youth hostels		Camp-sites		Others	
	Number	Bed-places	Number	Bed-places	Number	Bed-places	Number	Bed-places
1980	458	7826	11	1371	135	45658	50	2442
1981	450	7622	10	1172	137	46872	50	2892
1982	449	7880	9	1226	134	46960	48	2837
1983	417	7276	9	1225	124	44828	47	2817
1984	408	7674	9	1203	130	49888	45	2767
1985	388	7712	9	1203	126	49640	45	2767
1986	391	7872	9	1203	126	49840	45	2767
1987	377	7842	9	1171	127	50018	45	2767
1988	388	7873	9	1171	125	50328	45	2767
1989	399	7910	12	1361	128	51348	45	2767

Contribution of tourism to the economy	1988
Contribution to GNP	n.a.
Contribution to employment (units)	9,110
% of total GNP	n.a.
% of total employment	5.2



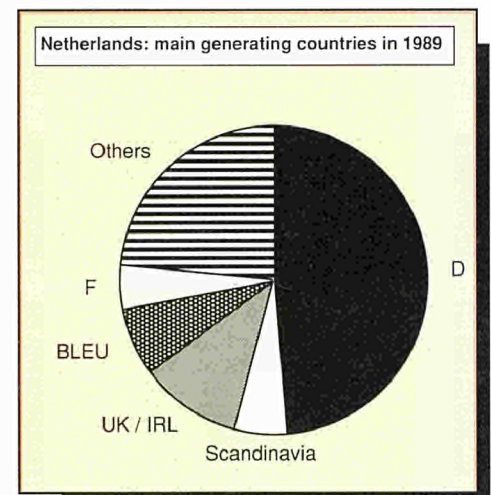
NETHERLANDS

Growth in overnight stays increases by 8%

During the period from April to September 1989 (inclusive) almost 39 million nights were spent in lodgings representing 8% more than in the corresponding period for 1988. The number of nights for Dutch residents rose to 28.1 million (+7%) and the number of nights of foreign visitors increased to 10.5 million (+11%). This is shown by provisional figures from the *Centraal Bureau voor de Statistiek* (Central Bureau of Statistics) (CBS).

During the summer of 1989 8.5 million nights were registered in hotels and boarding houses (7% more than in the corresponding six months of 1988). Of the 3.9 million guests, 57% came from abroad. Youth hostels and hotels accounted for 585 000 (-1%) nights spent by 150 000 guests; 66% of these came from abroad. Tourist camp-sites and other lodging accommodation such as bungalow parks and group accommodation recorded a total number of 29.3 million (+9%) overnight stays by 5.2 million guests of whom 22% came from abroad. Of the 10.5 million nights spent by foreign visitors the Federal Republic of Germany accounted for 5.1

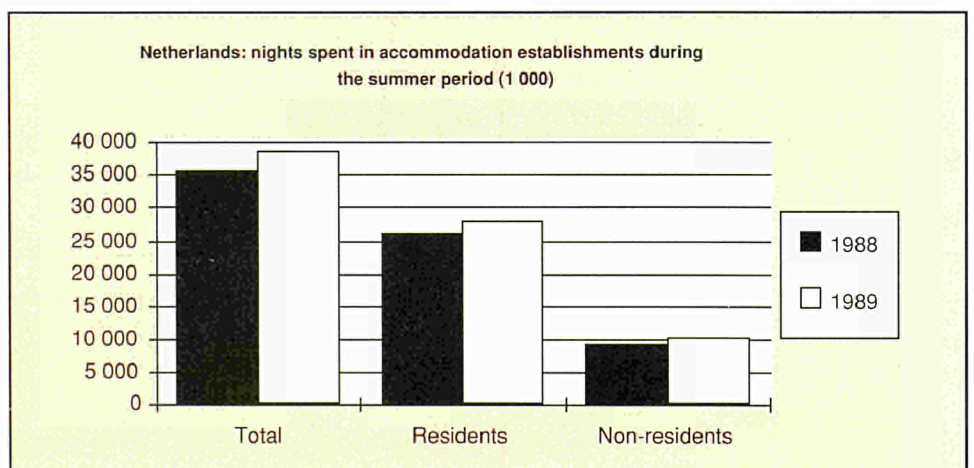
million (+9.9%) nights. Tourists from the United Kingdom and Ireland spent 1.1 million (+12.7%) nights in the Netherlands. Proportionally, the highest increases were recorded by the Scandinavian countries (+21%), Belgium and Luxembourg (+16.4%). Due to these increases, the number of nights spent by people from these countries amounted to 570 000 and 720 000 respectively. The



Nights spent in accommodation establishments

	1988 1)	1989 1)	Variation % 1989/88
Resident tourists	26,300,000	28,100,000	6.8
Non resident tourists	9,400,000	10,500,000	11.7
Total	35,700,000	38,600,000	8.1

1) For the period April-September.

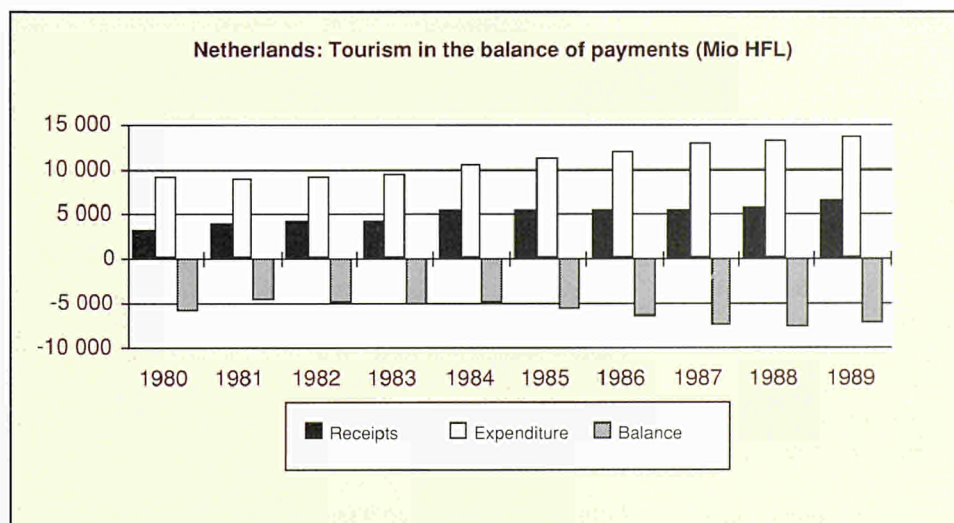


Nights spent by non-resident tourists in accommodation establishments			
Main generating countries ¹⁾	1988	1989	Variation % 1989/88
Germany	4,660,000	5,120,000	9.9
United Kingdom	1,020,000	1,150,000	12.7
Belgium/Luxembourg	620,000	720,000	16.1
Scandinavia	470,000	570,000	21.3
France	450,000	500,000	11.1
Italy, Spain, Portugal	570,000	660,000	15.8
Other European Countries	340,000	410,000	20.6
Others	1,270,000	1,370,000	7.9
Total	9,400,000	10,500,000	11.7

¹⁾ Summer period only.

Tourism in the balance of payments (Mio HFL)	1988	1989 ¹⁾	Variation % 1989/88
Receipts	5,680	6,407	12.8
Expenditures	13,315	13,683	2.8
Balance sheet	-7,634	-7,276	-4.7
<i>Share of 'Travel' receipts in exports of goods and services</i>	2.9%	3.1%	
<i>Share of 'Travel' expenditure in imports of goods and services</i>	7.4%	7.2%	

¹⁾ Estimated.



number of nights spent by French visitors rose by 11%, to 500 000. The considerable increase in the number of visitors from Italy, Spain and Portugal during the last few years continued in the summer season of the year. The number of nights increased by 16% and reached 660 000. The number of nights of visitors from outside Europe rose by 8%, to 1.4 million.

In 1988 receipts from tourism in the balance of payments increased by 12.8% reaching over HFL 6.4. On the contrary, tourist expenditure rose slightly from HFL 13.3 to 13.7 billion florins (+2.8%). The 'travel' item in the balance of payments represents 3.1% of exports and 7.2% of imports of all goods and services.

In 1989 the Dutch spent about 26.7 million holidays at home and abroad. Compared to 1988 this meant an increase of almost 7% or 1.7 million short and long holidays. The short holidays increased by 8%, and long holidays by 6%. The tentative results of the tourist season in 1989 have been calculated on the basis of the continuous holiday research (Continu Vakantie Onderzoek) (CVO) of the National Board of Tourism and the Dutch Research Institute for Recreation and Tourism. Since 1987 the CBS has been participating in this research.

It is expected that the number of holidays at home will rise by 7%,



whereas the number of holidays abroad increased by 6%. This implies that in comparison with 1988 the number of holidays at home grew by about 1 million and the number of holidays abroad by about 700 000. The relation between the share of holidays at home and abroad slightly favours holidays at home.

France and the Federal Republic of Germany strengthened their positions as holiday destinations for the Dutch, at the expense of Spain and some other southern destinations. France has become the leading foreign holiday destination in recent years. In 1989 the position of this country was further consolidated by a 14% increase in the number of holidays taken by Dutch tourists. As a result France will attract about 2.1 million holidays from the Netherlands. Almost 20% of foreign holidays chose France as a final destination. The Federal Republic of Germany ranks second with about 2 million holidays taken by Dutch tourists and registered a rise of 10% this year. Belgium occupied third place driving Austria from third to fourth place. Spain ranks fifth but in 1989 faced a drop of about 5% in the number of holidays taken by Dutch travellers.

Also in 1989 the hotel remained the primary form of accommodation though the Dutch increasingly prefer the use of bungalows and apartments. As far as modes of

transport are concerned, no major changes occurred in 1989. The car remained the favourite

means of transport for holidays in 1989. The considerable increase in the share of air transport during

Holidays of the Dutch in 1989		
Total:	rise of 7% or +1.7 million to 26.7 million holidays	
	At home %	Abroad %
Total	58	42
Long	42	58
Short	84	16
Foreign destination	Share %	Variation in % 1989/88
France	19	14
Germany	18	10
Belgium	12	15
Austria	11	2
Spain	9	-5
Accommodation (abroad)	Share %	Variation in % 1989/88
Hotel	36	2
Camping	29	7
Apartment	17	8
Bungalow	12	12
Means of transport (abroad)	Share %	Variation in % 1989/88
Car	61	5
Aeroplane	16	3 to 4
Coach	14	10
Train	4	20
Booked holidays (abroad)	Share %	Variation in % 1989/88
Transport and stay	29	9
Stay	15	12
Transport	4	4
Size of the group		
4.5 persons for short and 3.9 for summer holidays		
Expenditure (abroad)		
Total = +18% to HFL 10.6 billion. Average per holiday and person: +11% to HFL 964		
Average length of stay	1988	1989
Short	3.22 days	3.16 days
Long	13.05 days	12.83 days

Source: CVO (Continu Vakantie Onderzoek).

Residents' tourism	1988	1989	Variation % 1989/88
Holiday departure rate:	74.1	n.a.	n.a.
in the country	n.a.	n.a.	n.a.
abroad	n.a.	n.a.	n.a.
Number of holiday days spent in the country	96,6 Mio	100,7 Mio	4.3
Number of holiday days spent abroad	135,9 Mio	142,2 Mio	4.6

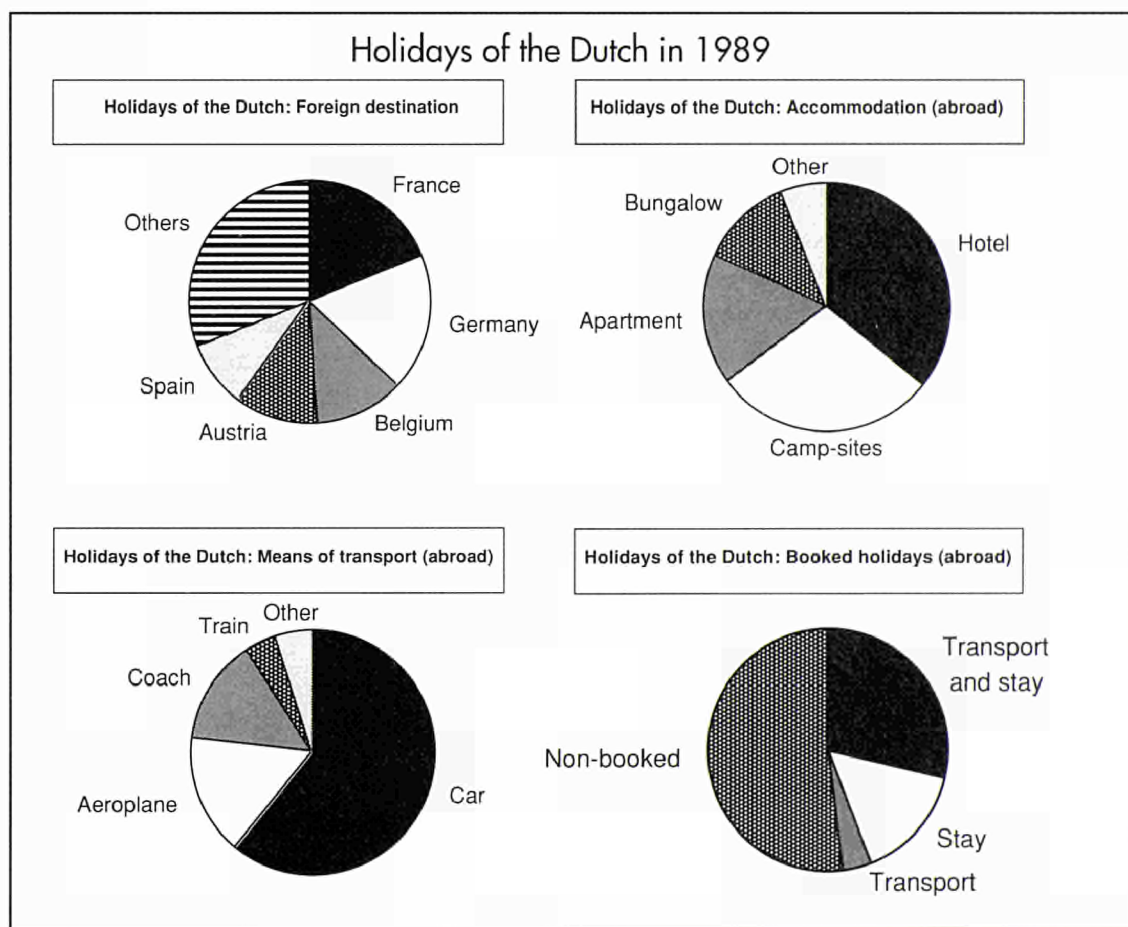
the last few years is now over. At present growth does not exceed 3%. The coach or shuttle-bus service accounts for an increasingly large share of holiday transport. With an increase of about 10%, the share of coach transport amounts to 14% of foreign holidays. Trains are also more frequently used for transport to and from the holiday destination. However the share of train traffic is still very small (4%).

In 1989 the Dutch spent about HFL 10.6 billion during their holidays abroad which constitutes an

increase of 18% in comparison with 1988. This increase is partly a result of the growth in volume but also attributable to the higher average expenditure on foreign holidays. In 1989 this amounted to HFL 946 per person per holiday, as against HFL 854 in 1988.

Contribution of tourism to the economy	1988
Contribution to GNP (Mio HFL)	5,658
Contribution to employment ¹⁾	110,700
% of total GNP	1.3
% of total employment	2.3

¹⁾ employed in hotels, restaurants, cafés.
Self-employed are not included.





PORTUGAL

Fall in United Kingdom tourism halts growth

Portugal's tourist industry has shown positive development during most of the past decade.

According to the WTO, in 1988 Portugal received 1.7% of world tourism and 2.6% of European tourism. The former represents 1.2% of international tourist payments in foreign currency, the latter, 2.0%.

Portugal received 9.7% of the tourists travelling to Mediterranean countries and 6.6% of Mediterranean tourist income.

In 1988 Portugal had 158 932 beds in apartments and hotels. This figure does not include accommodation establishments which are not officially registered.

Portugal differs from other receiving countries in that its share of upper-income tourism is considerable. However, in the past 10 years Portugal has also increased the number of holiday apartments available - particularly those rented on a 'timeshare' basis camp-sites in the south, and 'turismo de habitacao' in northern and central Portugal.

The objectives of Portugal's national tourism programme are the

following:

- increase tourism's share in the balance of payments (income, investments, etc.);
- use tourism as a factor determining regional development policies;
- use tourism as a means to improve the quality of life of Portugal's citizens;
- protect the country's natural and cultural assets (the coast, the tourist environment, traditional architecture and folklore, etc.).

According to provisional figures from official sources, a total of 16 470 897 people visited Portugal in 1989. This is 2.5% more than in 1988. It is estimated that slightly more than 40% of these visitors were tourists.

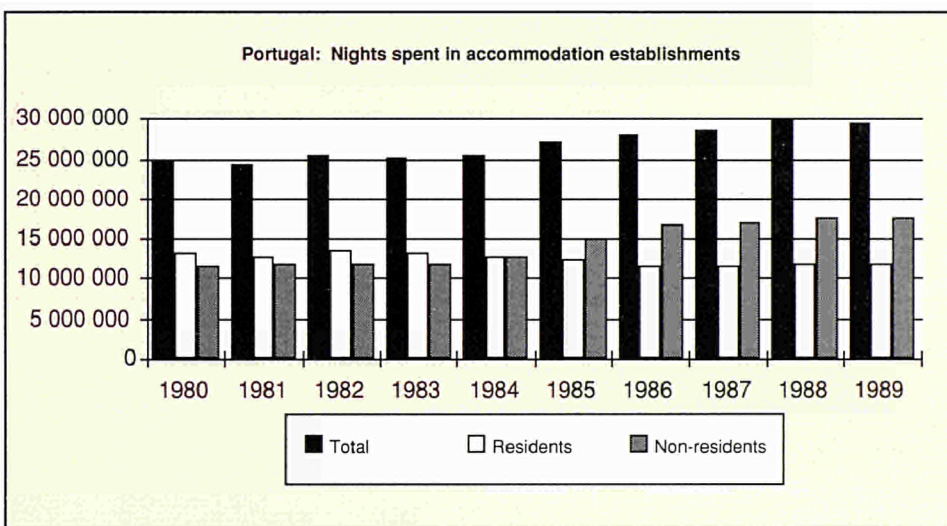
Figures for January-September 1989 reveal a drop in the number of Spanish tourists (- 0.3%), most of whom are daytrippers - and in the number of visitors from the United Kingdom (- 0.5%). These losses were compensated for by

Nights spent by non-resident tourists in accommodation establishments			
Months	1988	1989	Variation % 1989/88
January	648,806	698,297	7.6
February	790,393	818,448	3.5
March	1,132,515	1,233,398	8.9
April	1,262,596	1,191,534	-5.6
May	1,563,480	1,551,987	-0.7
June	1,728,969	1,614,198	-6.6
July	2,630,438	2,560,132	-2.7
August	3,142,140	3,031,873	-3.5
September	1,982,229	1,977,407	-0.2
October	1,430,148	1,412,675	-1.2
November	829,258	826,724	-0.3
December	645,596	663,383	2.8
Total year ¹⁾	17,786,568	17,580,056	-1.2

¹⁾ 1989 estimated.

Nights spent by resident tourists in accommodation establishments			
Months	1988	1989	Variation % 1989/88
January	427,299	430,679	0.8
February	488,532	483,624	-1.0
March	608,620	649,190	6.7
April	721,649	639,775	-11.3
May	721,481	730,956	1.3
June	1,064,730	945,051	-11.2
July	1,963,982	2,014,083	2.6
August	2,885,958	2,860,738	-0.9
September	1,523,316	1,633,510	7.2
October	656,589	697,441	6.9
November	469,719	487,229	3.7
December	463,703	499,825	7.8
Total year ¹⁾	11,995,578	12,072,101	0.6

¹⁾ 1989 estimated.



Nights spent by non-resident tourists in the whole accommodation establishments			
Main generating countries	1988	Variation % 1988/87	Share % Total
United Kingdom	5,415	-5.4	30.4
Germany	2,781	0.2	15.6
Spain	1,767	8.0	9.9
Netherlands	1,650	36.3	9.3
France	1,254	9.1	7.1
Usa	667	3.6	3.8
Sweden	570	26.8	3.2
Denmark	425	-0.4	2.4
Italy	427	15.5	2.4
Switzerland	371	-1.3	2.1
Canada	323	-10.0	1.8
Belgium	411	20.7	2.3
Others	1,725	—	9.7
Total	17,786	18.4	100.0

the increase in the number of visitors from France (+ 7.9%), the Netherlands (+ 17.1%), the United States (+ 2.8%) and Belgium (+ 27.4%).

The decline in tourists from Spain and Britain - which respectively account for 45.1% and 16.1% of total visitors - stems from circumstances in the countries of origin:

- a fall in Spanish daytrips (stays of less than 24 hours);
- high mortgage rates in the UK ;
- The mild climate in 1989.

Portuguese tourism shows the following concentrations

- By nationality : the United Kingdom accounts for 30.4 % of all overnight stays while Germany accounts for another 15.6%.
- By season: 37.4% of overnight stays take place during the summer months, but British and Scandinavian off-season tourism to the Algarve and Madeira keeps this from being excessively seasonal.
- By geographical area: Faro/Algarve (40%), Lisbon (21.4%), and Funchal/Madeira (13.7%) account for the largest number of overnight stays.

Domestic tourism is spread throughout the available categories of accommodation while foreign tourism registers a relative majority in top category hotels in the Algarve and Madeira.

The number of overnight stays by



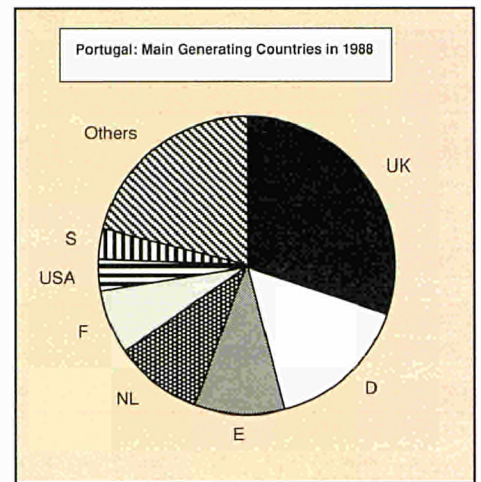
Portuguese residents registered a 4.6% increase in 1988 and a 0.6% increase in 1989. This was probably due to a rise in overnight business trips to the Lisbon area and the ongoing tendency of the Portuguese to spend their holidays in their own country.

Portugal was also affected by the 1989 downturn in mass tourism particularly due to the drop in tourists from Britain, the country which traditionally accounts for the largest number of foreign tourists to Portugal. There were fewer (-1.2%) overnight stays by foreign visitors than in 1988 when overnight stays in hotels, officially registered apartments, camp-sites and *colonias de ferias* totalled 17 786 568. The Portuguese Tourist Authority estimates that the total number of overnight stays by foreign tourists, including accommodation in non-registered lodgings, amounted to 50 471 000 in 1988.

British and Swedish tourists tend to stay for longer periods of time, particularly during the winter season. They stay in hotels and apartments included in tourist packages offered by travel agencies. Tourism from Spain - excluding daytrippers - and Italy tends to involve brief stays, is concentrated in the summer months and is organized by the travellers themselves, who stay in hotels, *pensoes* and at camp sites. Belgian, Dutch, French and Ger-

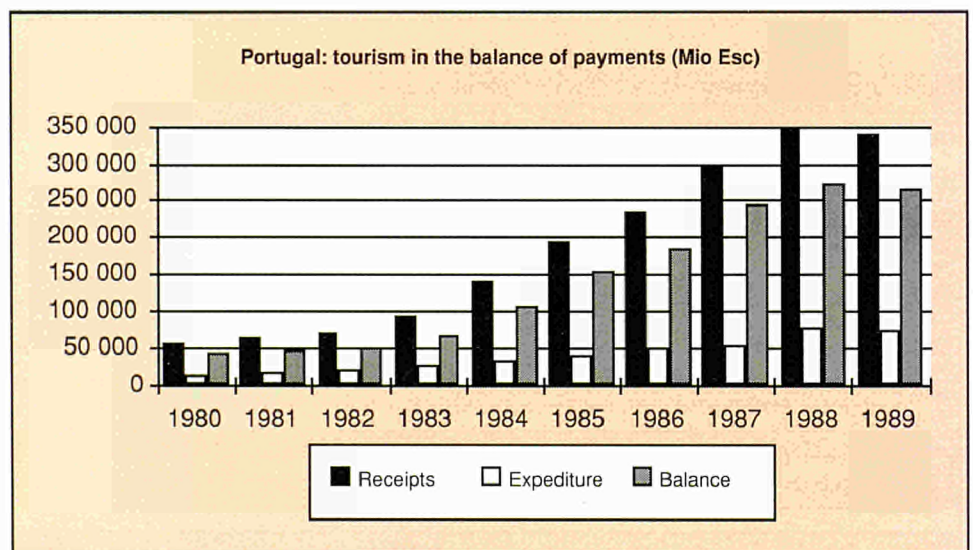
man tourists stay an average of 8 to 14 days in Portugal, principally during the summer season, and tend to be campers. Visitors from Brazil tend to stay at the homes of friends or relatives. American tourists have the highest average expenditure in Portugal.

Portugal's balance of payments reveals that tourism income in foreign currency terms increased by 15.4% in 1988 and that income from January-October 1989 was 15.9% higher than during the same period a year earlier.



Tourism in the balance of payments (Esc billion)	1988	1989 (Jan. Oct.)	Variation % 89/88 (Jan. Oct.)
Receipts	349.0	340.3	15.8
Expenditure	76.8	73.6	12.3
Balance sheet	272.2	266.7	16.9
Share of 'Travel' receipts in exports of goods and services ¹⁾	17.0%	17.3%	
Share of 'Travel' expenditure in imports of goods and services ¹⁾	2.8%	2.9%	

¹⁾ Estimates.



The tourism balance sheet in Portuguese currency registered an increase of 16.9% during the first 10 months of 1989.

Thus, the tourism balance accounted for 36.9% of the trade balance in 1988.

In 1988, 13 140 400 Portuguese citizens crossed the country's borders. Most of them were either daytrippers to Spain or emigrants returning to their country of residence. The number of Portuguese citizens leaving the country has been declining during the past few years.

In 1988, 22% of Portuguese citi-

zens took vacation trips principally in the month of August.

The average length of their vacations was as follows:

> 30 days	8%
22-30 days	45%
16-22 days	12%
8-15 days	31%
1-7 days	4%

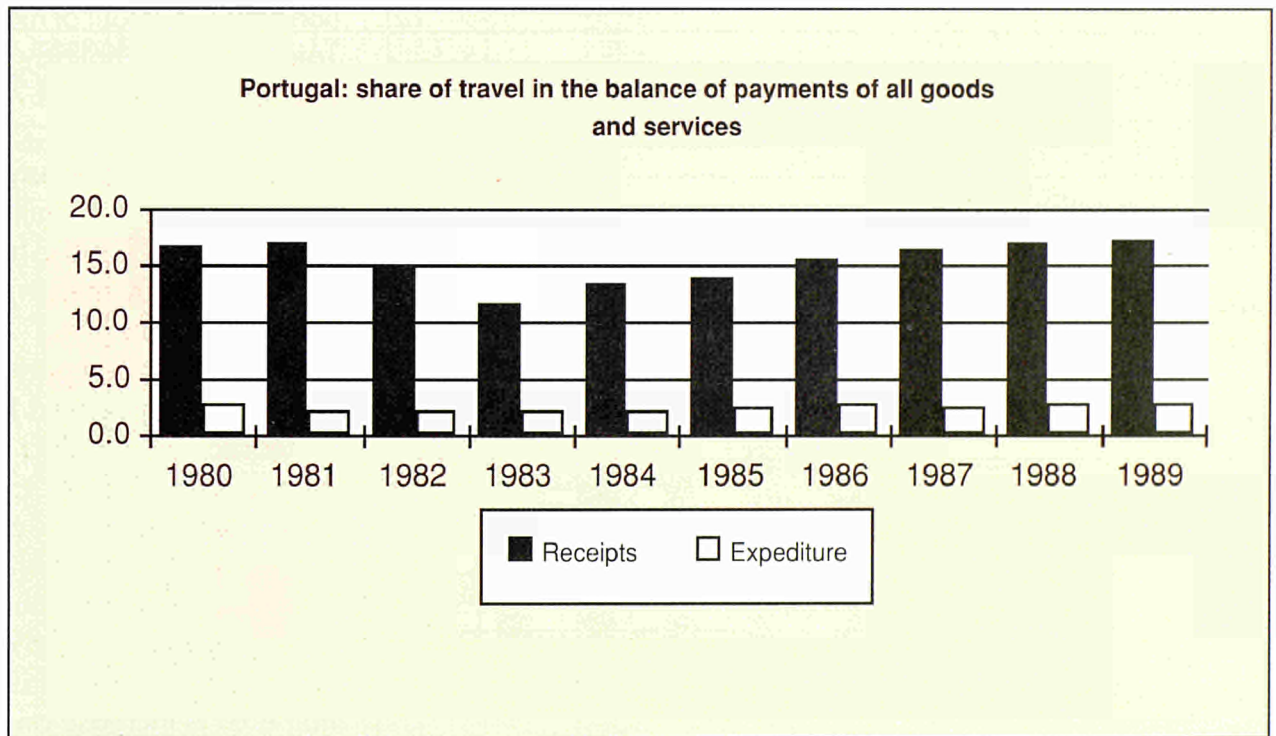
8% of Portuguese holiday-makers spent their holidays abroad. This figure increases to 11% if we count only those who spend their vacations somewhere other than in their permanent place of residence.

Foreign currency payments for

travel increased by 29% in 1988. During January-October 1989 these payments were 12.3% higher than during the same period a year earlier.

The *Secretaria de Estado do Turismo* estimates that tourism accounts for approximately 6% of Portugal's GDP and has made it possible to spread development among the various regions of the country, although not as evenly as would be desirable.

Tourism provides a total of 200 000 jobs in Portugal.





UNITED KINGDOM

British residents spend more on domestic holidays

This brief paper identifies certain tourism trends in 1989. Some data are still provisional estimates and interpretation of trends must be

treated with caution.

The main features are:

- there were a record 17.2 million

visits to the UK in 1989, up 9% on 1988. The main generating area is Western Europe;

- spending in the UK by non-resident visitors in 1989 was an estimated UKL 6 850 million, up 11% compared with 1988;

- in 1989, UK residents made a total of 110 million trips in the UK of one or more nights and spent UKL 10 900 million;

- UK holidaymakers took 64 million holidays of four or more nights. Total domestic holiday expenditure for 1989 was UKL 7 400 million;

- UK residents are estimated to have made 31.1 million visits abroad in 1989 and to have spent some UKL 9 400 million, the highest recorded level yet;

- the number of employees in the sectors directly related to tourism increased by 49 000 over the year to June 1989 to 1.4 million, which represents 6% of all employees in employment.

- Investment in major tourism projects completed in 1989 (in England alone) totalled UKL 972 million a 61% increase on 1988;

- In 1988 the total turnover of the tourist industry was estimated to

Visits to the United Kingdom by non residents (1 000)			
Months	1988	1989 ¹⁾	Variation % 1989/88
January	1,021	1,140	11.7
February	792	877	10.7
March	964	1,346	39.6
April	1,324	1,270	-4.1
May	1,191	1,348	13.2
June	1,498	1,527	1.9
July	1,930	2,075	7.5
August	2,084	2,261	8.5
September	1,535	1,636	6.6
October	1,366	1,410	3.2
November	1,073	1,150	7.2
December	1,022	1,110	8.6
Total year	15,800	17,150	8.5

¹⁾ Estimated to nearest 10 000.

Visits abroad by UK residents (1 000)			
Months	1988	1989 ¹⁾	Variation % 1989/88
January	1,406	1,728	22.9
February	1,384	1,631	17.8
March	1,679	2,060	22.7
April	2,080	2,138	2.8
May	2,133	2,401	12.6
June	3,130	3,163	1.1
July	3,326	3,358	1.0
August	3,967	4,397	10.8
September	3,729	3,882	4.1
October	3,077	3,140	2.0
November	1,695	1,720	1.5
December	1,224	1,460	19.3
Total year	28,830	31,078	7.8

¹⁾ Estimated to nearest 10 000.

have been UKL 19 000 million. This represented over 4% of total UK gross domestic product.

Non-residents are estimated to have made a record 17.2 million visits to the United Kingdom in

1989. This represents an increase of 9% over 1988. The increase in the number of visitors in 1989 was partly due to an increase of 9% in the number of visits by Western European residents.

Holiday trips made up over half the total number of tourist trips by UK residents in the UK in 1989 and a further 23% of trips were made in order to visit friends and relatives.

Spending on holiday trips accounted for over two-thirds of the total of UKL10 900 million spent by UK domestic tourists in 1989.

Residents of the United Kingdom took fewer long holidays (four or more nights) in Britain in 1989 and spending on long holidays in Britain increased by only a modest amount since 1988 (2%).

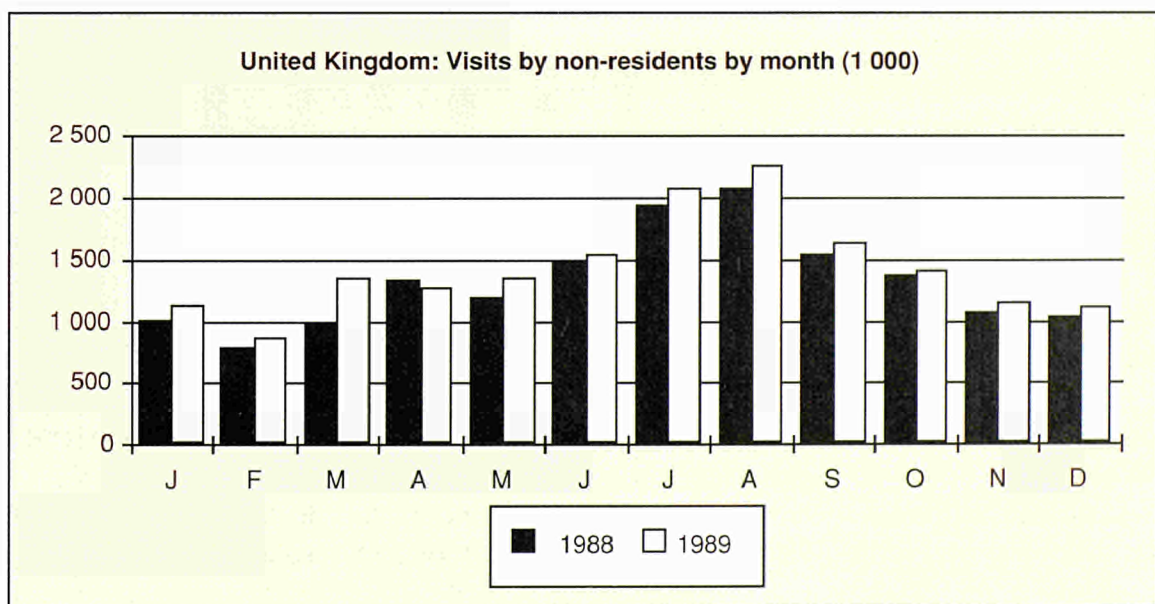
Self catering accommodation is more popular on British long holidays.

The most popular type of serviced accommodation was hotels.

Nights spent by non-resident tourists in accommodation establishments (million)			
Months	1988	1989	Variation % 1989/88
January - March	28.7	31.7	10.5
April - June	39.7	37.3	-6.0
July - September	70.3	79.1	12.5
October - December	34.2	38.2	11.7
Total Year	172.9	186.3	7.8

Domestic long holidays ¹⁾ taken by British adults			
	1988	1989	Variation % 1989/88
Percentage taking one or more long holidays:			
in the country	39	37	-5
abroad	29	29	
Number of long holidays taken in UK (million)	33.5	31.5	-6

¹⁾ Long holidays are defined as those of four or more nights.





There were an estimated 1.4 million jobs in June 1989 in the sectors of British industry that serve non-resident and resident tourists most directly. This estimate includes jobs in hotels, restaurants, cafés and tourist attractions. It is also estimated that a further 191 000 people were working in tourism-related industries accounting for 6% of all employment in the United Kingdom.

Self-employment in tourism-related industries was provisionally estimated to be 191 000 in Spring 1989, slightly below the level in 1988.

Investment in tourist facilities in England increased considerably during 1989. Investment in major hotel projects under construction at UKL 942 million at the end of June 1989 was the highest ever recorded.

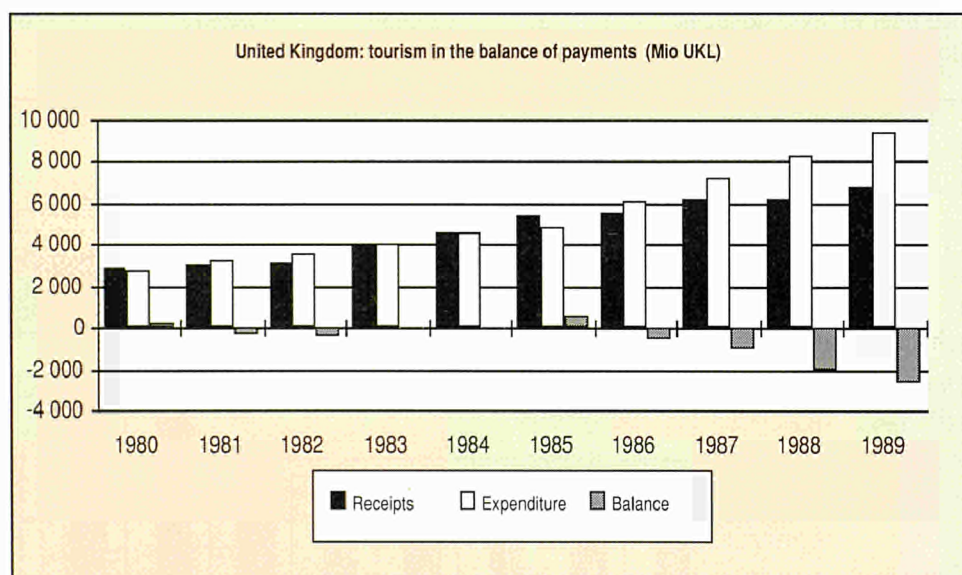
Major tourism projects (worth UKL 551 million) were completed during the second half of 1989, an increase of UKL 130 million (30%) on the first half of the year.

Future development of budget accommodation is underway with plans for 80 travel lodges to be completed by the end of 1990. However, investment growth could be affected by high borrowing costs and a slowdown in economic growth.

The main generating area continues to be Western Europe with around 60% of all visits to the UK, followed by residents of North

Nights spent by non-resident tourists in total accommodation establishments (Million)			
Main generating countries	1988	1989	Variation % 1989/88
EC countries	70.7	74.5	5.4
Other Western European countries	14.9	16.0	7.4
North America	34.4	36.3	5.5
Others	52.9	59.5	12.5
Total	172.9	186.3	7.8

Tourism in the balance of payments (Mio UKL)	1988	1989	Variation % 1989/88
Receipts	6,193	6,850	10.6
Expenditure	8,228	9,380	14.0
Balance sheet	-2,035	-2,530	24.3
<i>Share of 'Travel' receipts in exports of goods and services</i>	6.0%	6.0%	



America at around 20%. This is expected to be the pattern in future years, although numbers of visitors from the Far East, and in

particular Japan, are expected to increase.

In terms of the number of nights spent, Western Europe and the

European Community in particular are fast growing tourist generating areas.

Expenditure by non-resident visitors to the UK was UKL 6 850 million in 1989. This was 11% more than in 1988. Average expenditure per visit, at UKL 399 was 2% higher than in 1988, a fall in real terms.

As usual, the third quarter of 1989 (July to September) was the period when most non-resident visitor trips were made to the UK. Over one-third of all visits (35%)

were made during this period, similar to the proportion in 1987 and 1988. The quarterly distribution of the trips has not changed substantially over the decade; the most popular time to visit the UK has always been the third quarter and the least popular the first, but there are signs of a slight shift away from the third quarter and a lengthening of the traditional Christmas period.

UK residents are estimated to have made 31.1 million visits abroad in

1989 and to have spent some UKL 9 380 million. These figures represent increases of 8% and of 14% respectively over 1988 and are the highest levels yet recorded.

Western Europe remained by far the most popular destination in 1989, accounting for 80% of visits abroad by UK residents.

The number of visits to Western Europe rose by 7% in 1989 but there was also a 19% rise in the number of visits to North America, to a record 2.2 million.

1989 is expected to show that the overseas package holiday is becoming less attractive to UK tourists, a greater proportion of whom are making their own holiday arrangements.

It is estimated that domestic tourists made 110 million trips involving at least one night spent away from home in 1989.

Spending on these trips totaled UKL 10 900 million. (Comparisons with 1988 are not possible because of a change of survey in 1989.)

Contribution of tourism to the economy	1988
Spending by UK residents involving an overnight stay	8,100
Leisure day trips by UK residents	3,000
Spending by non-resident visitors to the UK	6,200
Payments by non-residents to UK carriers	1,500
Total tourism turnover, 1988 (Mio UKL)	18,800
Contribution to GDP (%)	4
Employees in employment, June 1989 (1 000)	1,370
Proportion of all employees in employment (%)	6



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