TOURISM IN EUROPE

EUROPEAN COMMISSION:
EUROSTAT — DG XXIII

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Y. Franchet
Generaldirektor

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To ensure that the vast quantity of accessible data is made widely available, and to help each user make proper use of this information, Eurostat has set up two main categories of document: statistical documents and publications.

The statistical document is aimed at specialists and provides the most complete sets of data: reference data where the methodology is well-established, standardized, uniform and scientific. These data are presented in great detail. The statistical document is intended for experts who are capable of using their own means to seek out what they require. The information is provided on paper and/or on diskette, magnetic tape, CD-ROM. The white cover sheet bears a stylized motif which distinguishes the statistical document from other publications.

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To help the user focus his research, Eurostat has created 'themes', i.e. subject classifications. The statistical documents and publications are listed by series: e.g. yearbooks, short-term trends or methodology in order to facilitate access to the statistical data.

Y. Franchet
Director-General

Pour établir, évaluer ou apprécier les différentes politiques communautaires, la Commission européenne a besoin d'informations.

Eurostat a pour mission, à travers le système statistique européen, de répondre aux besoins de la Commission et de l'ensemble des personnes impliquées dans le développement du marché unique.

Pour mettre à la disposition de tous l'importante quantité de données accessibles et faire en sorte que chacun puisse s'orienter correctement dans cet ensemble, deux grandes catégories de documents ont été créées: les documents statistiques et les publications.

Le document statistique s'adresse aux spécialistes. Il fournit les données les plus complètes: données de référence où la méthodologie est bien connue, standardisée, normalisée et scientifique. Ces données sont présentées à un niveau très détaillé. Le document statistique est destiné aux experts capables de rechercher, par leurs propres moyens, les données requises. Les informations sont alors disponibles sur papier et/ou sur disquette, bande magnétique, CD-ROM. La couverture blanche ornée d'un graphisme stylisé démarque le document statistique des autres publications.

Les publications proprement dites peuvent, elles, être réalisées pour un public bien déterminé, ciblé, par exemple l'enseignement ou les décideurs politiques ou administratifs. Des informations sélectionnées, triées et commentées en fonction de ce public lui sont apportées. Eurostat joue, dès lors, le rôle de conseiller.

Dans le cas d'un public plus large, moins défini, Eurostat procure des éléments nécessaires à une première analyse, les annuaires et les périodiques, dans lesquels figurent les renseignements adéquats pour approfondir l'étude. Ces publications sont présentées sur papier ou dans des banques de données de type vidéotex.

Pour aider l'utilisateur à s'orienter dans ses recherches, Eurostat a créé les thèmes, c'est-à-dire une classification par sujet. Les documents statistiques et les publications sont répertoriés par série — par exemple, annuaire, conjoncture, méthodologie — afin de faciliter l'accès aux informations statistiques.

Y. Franchet
Directeur général

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Foreword

Tourism is an activity which has enjoyed steady growth over a long period of time. It contributes to reinforcing economic and social cohesion in the Union as well as the European identity and people's mutual understanding. Its importance will grow still more in the coming years, offering some of the best prospects for creating new jobs.

Despite the evident success of Europe as the driving force for tourism, there are no grounds for complacency. Strengthening the competitiveness of Europe as a tourist destination and successfully matching tourists' needs with tourism supply without damaging the various local assets are the new challenges to be faced.

As a basic tool of this modernisation process, reliable and comparable statistical information help us to identify trends and changes. This knowledge enables businesses, professional organisations and public authorities to better plan their strategies.

By providing a great deal of essential information about the current state of Europe's tourist industry, this publication is intended to contribute to achieving these goals.

Christos Papoutsis
Commissioner

Yves-Thibault de Silguy
Commissioner

Introduction

This publication is a result of the joint efforts of Eurostat, the Statistical Office of the European Communities, and Directorate General XXIII of the European Commission, responsible for enterprise policy, trade, tourism and cooperatives, which have been undertaken over a period of several years, with a view to improving the knowledge of the tourism sector.

The first edition of "Tourism in Europe" was published in 1990. This new edition, by going into more detail and trying to take a wider approach, has benefitted from the fruitful co-operation developed between the European Union, member States and EFTA countries. Despite the current lack of harmonised statistical data on tourism, an attempt is made to present the relevant elements of Europe's tourism structure and to outline recent trends.

A major step towards the qualitative improvement and integration of the tourism statistical information system at European level will be the development of adequate Community measures as set out in the Directive proposed by the European Commission to the Council.

By providing the means for a better understanding of the tourism industry and its market, it is hoped to make a useful contribution to the work of all decision-makers and researchers interested in this field.

Heinrich von Moltke
Director General
DG XXIII

Yves Franchet
Director General
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Technical Note

In *Part I* the EU and EFTA countries are looked at globally. An extensive chapter focuses on analysing very recent trends and developments in tourism, offering the latest and in some cases still provisional data. The three following chapters provide structural information on tourism supply, tourism demand and the impact of tourism.

In *Part II* the individual EU/EFTA countries are dealt with. The objective is to present an analysis focusing on issues and characteristics specific to the respective countries. These chapters were written in very close co-operation with the Member States.

The data used in the country specific chapters are to a large extent based on the Eurostat information system "TOUR". Data contributions by the Member States are up to now provided on a voluntary basis.

Numerous additional sources were used in order to supplement the "TOUR" information system. For the country specific chapters *(Part II)* the final data selection and control was carried out by the respective National Statistical Institutes. For the general chapters *(Part I)* the principal sources for all tables and graphics are indicated.

The terminology specific to tourism used in this publication is fully in line with the definitions developed by the World Tourism Organisation and the Eurostat Methodology on Tourism Statistics.

A fundamental definition is that of the term ***"Tourism"*** which - according to the World Tourism Organisation - *comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes.*

In relation to a given country the following forms of tourism can be distinguished:
* ***Domestic tourism****, involving residents of the given country travelling only within this country;*
* ***Inbound tourism****, involving non-residents travelling in the given country;*
* ***Outbound tourism****, involving residents travelling in another country.*

The three basic forms of tourism can be combined in various ways to derive the following categories of tourism:

* ***Internal tourism**, which comprises domestic tourism and inbound tourism;*
* ***National tourism**, which comprises domestic tourism and outbound tourism;*
* ***International tourism**, which consists of inbound tourism and outbound tourism.*

Also very important are the definitions of tourist accommodation establishments.

***"Tourist accommodation"** is any facility that regularly or occasionally provides overnight accommodation for visitors.*

***"Collective accommodation establishments"** are establishments which provide overnight lodging for the traveller in a room or some other unit. The number of places it provides must be greater than a specified minimum amount for groups of persons exceeding a single family unit and all the places in the establishment must come under a common commercial-type management, even if it is not-profit-making.*

***"Hotels and similar establishments"** are collective accommodation establishments typified as being arranged in rooms, in numbers exceeding a specified minimum, and as providing certain services including room services and daily bed-making and cleaning of the sanitary facilities.*

***"Supplementary accommodation and specialised establishments"** are the remaining types of tourist accommodation belonging to the division of collective accommodation establishments. Such establishments are intended for tourists, may be non-profit-making, coming under a common management, providing minimum common services (not necessarily room service), and not necessarily being arranged rooms but perhaps in dwelling-type units, campsites or collective dormitories and often engaging in some activity besides accommodation, such as health care, social welfare or transport.*

Balance of Payments data are in line with the definitions in the Balance of Payments Manual by the International Monetary Fund. The ***"Balance of Payments"*** is defined as *the record of a countries international transactions with the rest of the world (or, in other words, transactions of its residents with non-residents).* Data in this publication mainly focus on transactions concerning "Travel". ***"Travel"** covers goods and services acquired from an economy by non-resident travellers during their stay on the territory of that economy and for their own use.*

As this publication was prepared in 1994 and is based on data from the late 1980s and early 1990s, the reference base for the presentation of data is the European Union and the EFTA as defined until 31 December 1994 (EU with 12 Member States, EFTA with 7 Member States).

Monetary figures are in most cases presented in ECU. Data have been calculated according to the respective average annual exchange rates.

For further information by Eurostat on Tourism-Statistics please refer to the following publications:

Tourism - Annual Statistics: Eurostat, Theme 7 - Services and Transport, Series C - Accounts Surveys and Statistics

Tourism - Monthly Statistics: Eurostat, Theme 7 - Services and Transport, Series B - Short Term Trends

Contents

Part I: Tourism in Europe - recent trends and general structures

Part II: Tourism in Europe - country reports for member states of the EU and EFTA

All country reports are structured as follows:

* *General Situation and Key Indicators: Development and Impact of Tourism*
* *Tourism Supply*
* *Tourism Demand*

PART I

Tourism in Europe - recent trends and general structures

TOURISM IN EUROPE

Recent Trends

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1. OVERVIEW

1.1 Scenario

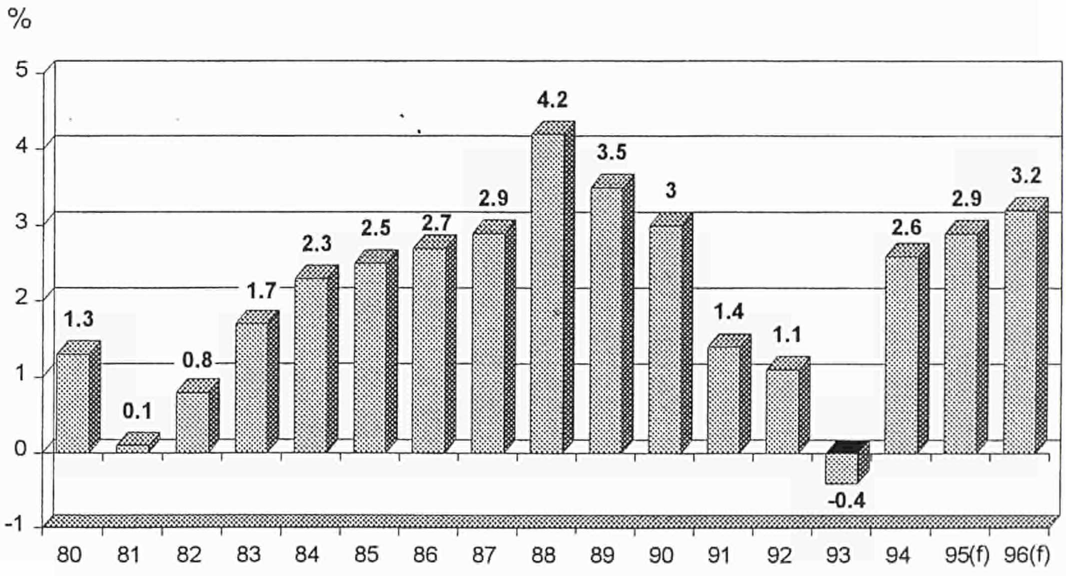
In keeping with worldwide economic growth, 1994 was a favourable period for the EU, which registered a recovery in growth equal to a 2.6% increase of the GDP. The growth was particularly due to an increment by around 10% of the exports destined to non European countries. Consequently, investments that had decreased in 1993, also made a recovery in 1994. The only negative note is the unemployment rate, which still shows no sign of improvement and, on the contrary, has increased slightly in respect to 1993.

Nineteen ninety-three closed with an overall negative situation for European and EU economies, together showing a decline of 0.4 per cent of GDP (in real terms), a drop not occurring since the time of the first oil crisis. This recession has affected the entire continent except for the UK and some smaller countries. However, recession hit the UK earlier (1991-92), when the rest of Europe had not yet been affected.

The 1993 decline of GDP represents the peak in a complex period of crisis which started in 1990, not due to outside factors, as was that of the 70s and early 80s, but for internal reasons, which - aside from the differences in individual national situations and the extent to which these are influenced by external factors - all derive in principle from the need to redress public spending and recover competitiveness with respect to other major world economies. The resulting severe budget policies, moderate wages and income growth, restructuring of economic activities and high interest rates have therefore led everywhere to a slow down of domestic demand and economic activity. This has even been true for many of those countries whose currencies were strongly devalued after the summer of 92, and which enjoyed notable increases in the nominal value of their exports.

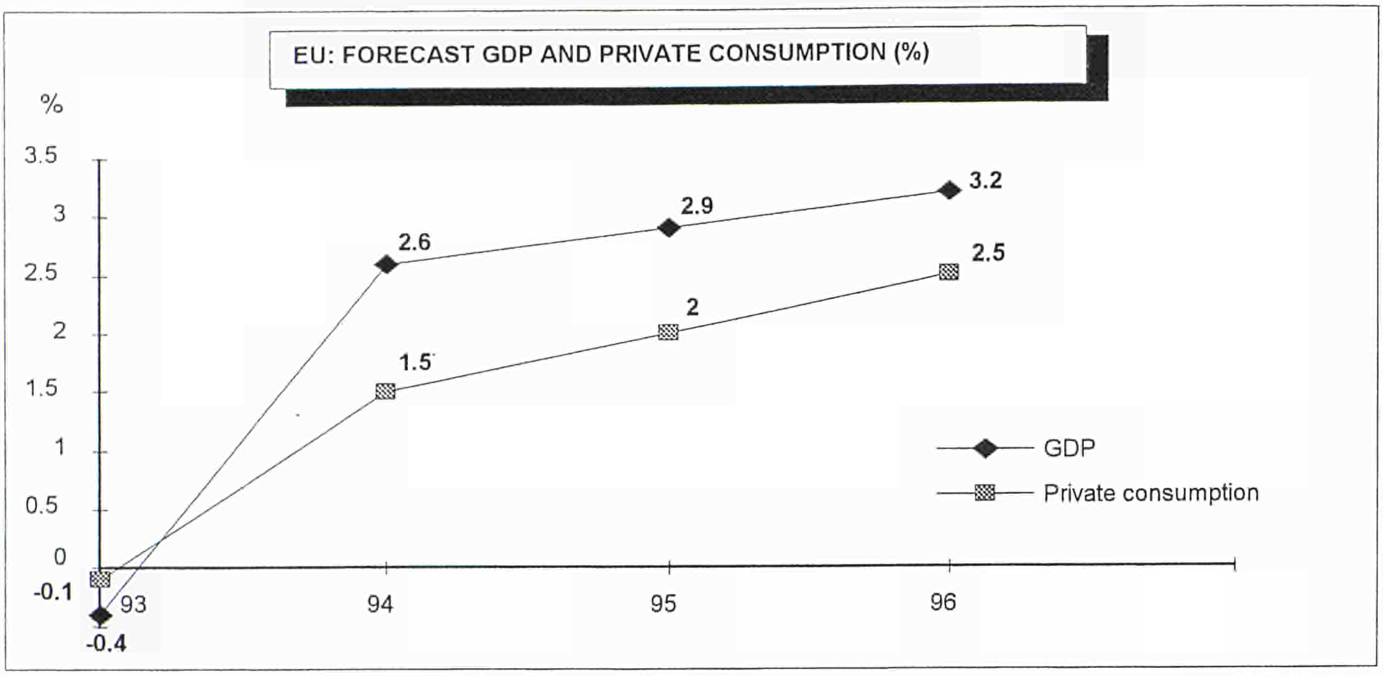
Developing country economies, and international finance movements in general, have continued to be strongly affected by the costs of German reunification and its consequences, notably on lending rates (exceptional costs in terms of global amount and in terms of historical events which generated them). Nevertheless, this enormous financial effort is now beginning to show signs of positive results which go beyond a national context.

EU: GDP TRENDS AND FORECAST (%)



(f): forecasts

Source: European Commission



Source: European Commission

In 1993 recession was preceded by a currency storm that dealt a near-fatal blow to the EMS and put a risk the solidarity of the European Union itself, forming the occasion to make significant adjustments to European exchange rates. Nonetheless, the countries that gained economic advantage through devaluation did not manage to turn it into concrete growth to any great extent; the nominal increase in exports did not have a corresponding development in real terms, given the generally weak demand from other European states.

1.2 Private consumption expenditure

Private household final consumption expenditure is particularly important to the analysis of the dynamics of the tourism sector within the aggregate demand.

In 1994 there was an increase of 1.5% in private consumption. This upturn in respect to 1993 also appears to be confirmed for the following years in that forecasts indicate an increase of 2.0% for 1995 and 2.5% for 1996. However in both cases the increase remains below similar predictions for the changes in GDP.

These recent forecasts of an increase are higher than previous ones, since the economic upsurge in European countries is more intense than the expectations formulated. However the growth differential in consumption with respect to GDP will not be mitigated if it also varies more than 1994 summer forecasts predicted.

Therefore, in the final analysis the following can be stated: private consumption expenditure is increasing at a rate that is less than the overall economy and is destined to continue to do so for the next few years.
This is obviously no good news for the tourism sector, neither for actual data nor for forecasts.

According to figures provided by the European Commission[1], in 1993 private consumption fell by 0.1%; this is a weighted average of very diverse trends (which themselves are due to some obvious cyclical lags and to national specificities). Even when it is of positive sign, in no case is it an appreciable amount, except in the United Kingdom, for the reasons already mentioned, and in some smaller countries.

Concerning 1993 the economic consequences for the tourism sector of this trend in the aggregate private consumption are certainly not, nor could they have been, of a positive sign. On the basis of the information available for 1993, the value added of the sector presents, net of inflation, increases of 1-2 percentage points (the Netherlands and France) and vice versa, negative changes in Italy (over 2 points) and in Finland (for a

1) COM(94) 615 final, Brussels, 13.12.1994

good 12 points). Even wider losses are found in occupational levels (in France, Italy, Finland, Switzerland) and these are often greater than in the value added, a sign that in some countries the cyclical difficulties grew wider due to a reorganization of business in order to recover productivity and profitability margins, as always happens when the market restricts. Finally the effective activity of the sector, measured by nights spent in tourist establishments, has been reduced.

At the root, the unsatisfactory economic results are evidently due to a net reduction of the real activity of the sector; an extension of the available data also indicates that the value added and the occupation levels have suffered wider and more general losses beyond those of the countries cited above.

In terms of nights a decrease on the order of 1.8% has taken place in sector activity; this is more attributable to the EU area (-2%) than to the EFTA area which is, instead, substantially stable.

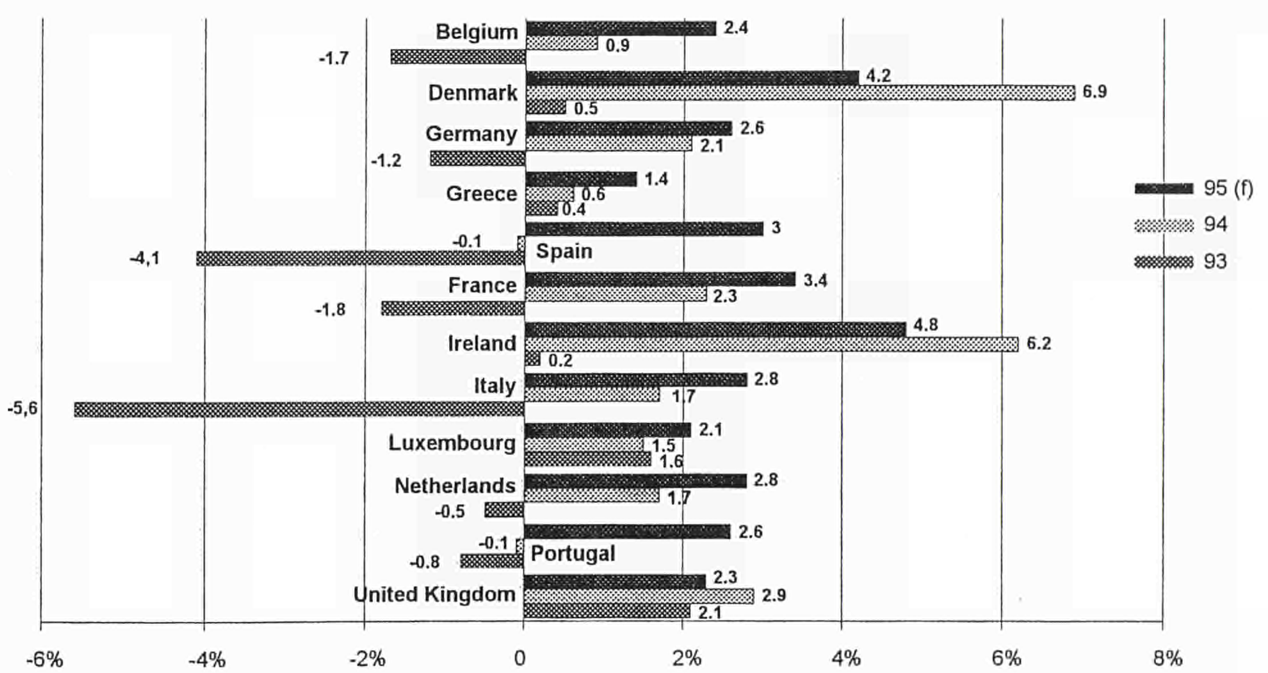
The situation in 1994 nevertheless shows a distinct improvement. The increase in private consumption means an increase in the buying power of families for luxuries with a positive effect on tourism. Although a breakdown of figures is not yet available, according to the WTO in Europe in 1994 a rise of 1.9% over 1993 was recorded (compared to 0.9% of the previous year) in terms of international arrivals and 0.6% (compared to -4.8%) in terms of receipts

1.3 Price levels and currency changes

Even without establishing statistical correlations, international tourism, especially that for pleasure, may be considered, all other factors held equal, to be dependent to a large measure on the relative levels of prices, which in turn are determined by exchange rate relationships between the different national currencies and, in the short term, by inflation rate differentials.

The drastic realignment of European currency exchange rates during the summer of 1992, a fact already al-

TREND AND FORECAST OF TOTAL DOMESTIC DEMAND IN THE EU COUNTRIES (%)



f: forecast

Source: European Commission

Exchange rate trends 1992-1993: relative changes in competitiveness*

	Belgium	Denmark	Germany	Greece	Spain	France	Ireland	Italy
Belgium	-	1.00	1.02	0.90	0.87	1.00	0.92	0.84
Denmark	1.00	-	1.02	0.90	0.87	1.00	0.92	0.84
Germany	0.98	0.98	-	0.88	0.85	0.99	0.91	0.83
Greece	1.12	1.12	1.14	-	0.97	1.12	1.03	0.94
Spain	1.15	1.15	1.17	1.03	-	1.16	1.07	0.97
France	1.00	1.00	1.01	0.89	0.86	-	0.92	0.84
Ireland	1.08	1.08	1.10	0.97	0.94	1.09	-	0.91
Italy	1.19	1.19	1.21	1.06	1.03	1.19	1.10	-
Luxembourg	1.00	1.00	1.02	0.90	0.87	1.00	0.92	0.84
Netherlands	0.98	0.98	1.00	0.88	0.85	0.99	0.91	0.83
Portugal	1.10	1.11	1.13	0.99	0.96	1.11	1.02	0.93
UK	1.08	1.08	1.10	0.97	0.94	1.09	1.00	0.91
Norway	1.06	1.06	1.08	0.95	0.92	1.07	0.98	0.89
Austria	0.99	0.99	1.00	0.88	0.86	0.99	0.91	0.83
Switzerland	0.98	0.98	1.00	0.88	0.85	0.99	0.91	0.83
Finland	1.19	1.19	1.21	1.06	1.03	1.19	1.10	1.00
Sweden	1.24	1.25	1.27	1.11	1.08	1.25	1.15	1.05

	Luxembourg	Netherlands	Portugal	U.K.	Norway	Austria	Switzerland	Finland	Sweden
Belgium	1.00	1.02	0.91	0.92	0.94	1.02	1.02	0.84	0.80
Denmark	1.00	1.02	0.90	0.92	0.94	1.01	1.02	0.84	0.80
Germany	0.98	1.00	0.89	0.91	0.92	1.00	1.00	0.83	0.79
Greece	1.12	1.14	1.01	1.03	1.05	1.13	1.14	0.94	0.90
Spain	1.15	1.17	1.04	1.06	1.09	1.17	1.17	0.97	0.93
France	1.00	1.01	0.90	0.92	0.94	1.01	1.01	0.84	0.80
Ireland	1.08	1.10	0.98	1.00	1.02	1.10	1.10	0.91	0.87
Italy	1.19	1.21	1.08	1.10	1.12	1.21	1.21	1.00	0.96
Luxembourg	-	1.02	0.91	0.92	0.94	1.02	1.02	0.84	0.80
Netherlands	0.98	-	0.89	0.91	0.92	1.00	1.00	0.83	0.79
Portugal	1.10	1.12	-	1.02	1.04	1.12	1.12	0.93	0.89
UK	1.08	1.10	0.98	-	1.02	1.10	1.10	0.91	0.87
Norway	1.06	1.08	0.96	0.98	-	1.08	1.08	0.90	0.85
Austria	0.99	1.00	0.89	0.91	0.93	-	1.00	0.83	0.79
Switzerland	0.98	1.00	0.89	0.91	0.92	1.00	-	0.83	0.79
Finland	1.19	1.21	1.07	1.09	1.12	1.20	1.21	-	0.95
Sweden	1.24	1.27	1.13	1.15	1.17	1.26	1.27	1.05	-

(*) Variations in competitiveness among European countries' currencies have been calculated as follows:
variation 1993/1992 of the exchange rate of a national currency in respect to the ECU divided by the variation 1993/1992 of the exchange rates of each of the other national currencies in respect to the ECU

Source: elaborations based on average annual values of trends in national currencies

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luded to previously, profoundly changed the relative prices (in national currencies of the different countries) for European citizens with the aim of moving from one country to another for tourism purposes.

As is known, the years 1993 and 1994 were characterized by a profound change in currency exchange ratio within the EU countries. This has evidently had a considerable influence on the prices of products and services offered to tourists and, as a consequence, on international tourism.
The general trend has been the strengthening of strong currencies within Europe, the DM, HFL, SFR, which mainly coincide with the more substantial markets of origin of the tourist flow. The UKL recorded up and down trends.
Devaluation mainly occurred in Southern European countries (Greece, Spain, Italy and Portugal) as well as in the Scandinavian countries: the first, therefore especially benefited from the considerable increase of the tourist flow in a North/South direction, thereby increasing the demand for Mediterranean shores.
The above described trends, even though less accentuated, continued during 1994 (the exception being the recovery of the FMK and the stability of the ESC and FF).

On the basis of the average exchange rates of national currencies with respect to the ECU in 1992 and in 1993, the changes for each country with respect to all the others have been calculated. The results, shown in the table, evidence the relative variations of price competitiveness for all movements from one country towards all of the others; a Danish citizen who travels to the United Kingdom or Ireland between 1992 and 1993 will find it to be more economical by

Employment and value added in the tourism sector

	Employment			Value added at factor cost[1]			
	1992	1993	92/93 (%)	1992	1993	92/93 (%)	Consumption deflationary factor
Belgium	n.a.	n.a.	-	n.a.	n.a.	-	2.8
Denmark	96 081	n.a.	-	9 615	n.a.	-	1.5
Germany	951 000	952 000	0.1	n.a.	n.a.	-	4.0
Greece	n.a.	n.a.	-	n.a.	n.a.	-	14.0
Spain	n.a.	n.a.	-	n.a.	n.a.	-	5.1
France	762 500	754 200	-1.1	226 428	235 877	4.2	2.1
Ireland	n.a.	n.a.	-	n.a.	n.a.	-	1.9
Italy	976 700	974 500	-0.2	46 351	47 363	2.2	4.8
Luxembourg	n.a.	n.a.	-	n.a.	n.a.	-	3.5
Netherlands	182 500	195 000	6.8	16 756	17 327	3.4	2.1
Portugal	185 000	197 000	6.5	n.a.	n.a.	-	6.7
United Kingdom	1 205 000	n.a.	-	24 114	n.a.	-	3.5
Norway	14 112	n.a.	-	n.a.	n.a.	-	1.9
Austria	136 543	137 963	1.0	n.a.	n.a.	-	3.6
Switzerland	72 184	70 767	-2.0	n.a.	n.a.	-	2.9
Finland	63 000	59 000	-6.3	7 793	7 120	-8.6	3.7
Sweden	n.a.	n.a.	-	18 856	n.a.	-	6.1

(1) At current prices in national currency

Source: elaboration based on Eurostat data

The tourism account balance (in billions of ECU)

	1992			1993		
	Credits	Debits	Balance	Credits	Debits	Balance
BLEU	3 136	5 109	-1 973	3 479	5 439	-1 960
Denmark	2 869	2 867	2	2 599	2 738	-139
Germany	8 546	28 287	-19 741	8 974	32 041	-23 067
Greece	2 460	911	1 549	n.a.	n.a.	-
Spain	17 103	4 261	12 842	16 516	4 021	12 495
France	19 397	10 609	8 788	19 922	10 919	9 003
Ireland	1 245	1 037	208	1 607	n.a.	-
Italy	17 678	13 903	3 775	18 840	12 005	6 835
Netherlands	4 010	7 356	-3 346	3 990	7 669	-3 679
Portugal	2 841	891	1 950	3 568	1 574	1 994
United Kingdom	10 466	15 134	-4 668	11 025	14 588	-3 563
EUR 12 [1]	89 748	90 353	-605	92 904	92 884	20
Finland	1 017	1 864	-847	1 059	1 382	-323
Sweden	2 363	5 196	-2 833	n.a.	n.a.	-
Norway	1 831	3 119	-1 288	1 580	3 044	-1 464
Austria	11 304	6 487	4 817	11 487	6 997	4 490
Switzerland	5 966	4 735	1 231	5 997	4 971	1 026

(1) Estimate

Source: Eurostat

approximately 8% due to changes in the exchange rate; such being the revaluation of the Danish kroner with respect to the currencies of the other two countries. He will not find there to be any difference when travelling to Belgium or to Luxembourg and he will find it to be more expensive by 2% when travelling to the Netherlands or to Germany, and so on.

Some countries, as can be seen, have gained in competitiveness with respect to many others (United Kingdom, Ireland, Italy, Spain, Portugal, Greece, Finland, Sweden and Norway); the others have lost this advantage. The first group includes those countries potentially able to attract greater flows of tourists and at the same time keep their own citizens, due to the greater expense involved when travelling to countries of the second group and vice versa.

In the short term, these changes in exchange rate relationships may be modified positively or negatively by inflation rate differentials. A graph summarizes this and positions the individual countries on the basis of their exchange rate variation with respect to the ECU and on the basis of the difference between the domestic inflation rate and the EU average. Four groups of European countries are evidenced: those of central Europe (Germany, the Netherlands, Denmark, etc.), those of the south (Italy, Greece, Portugal, Spain) those of the north (Sweden, Finland, Norway) and the United Kingdom-Ireland duo. These last three groups include, therefore, those countries that should have attracted the majority of tourists from the first group, and that should have kept their own citizens at home due to discouragement from travelling abroad by unfavourable exchange rate relationships.

The importance of also taking the inflation rate into consideration is underscored by the position of Greece. A close to 15% increase in domestic prices, approximately 11 points higher than the EU average, has completely reabsorbed the competitive advantage deriving from a less than 10% devaluation. The same thing, in part, has taken place for Portugal, while almost all the other countries that have greatly devalued their currency have had inflation differentials (with respect to countries that have not devalued) that have permitted them to maintain, to a large degree, the margins acquired through the depreciation of the national currency.

Among the EFTA countries, while Finland, Norway and Sweden have combined a strong devaluation with a low increase in prices thereby gaining in competitiveness, Switzerland and Austria have not substantially modified their positions with respect to the central European countries and have maintained nearly constant exchange rates and analogous variations in prices.

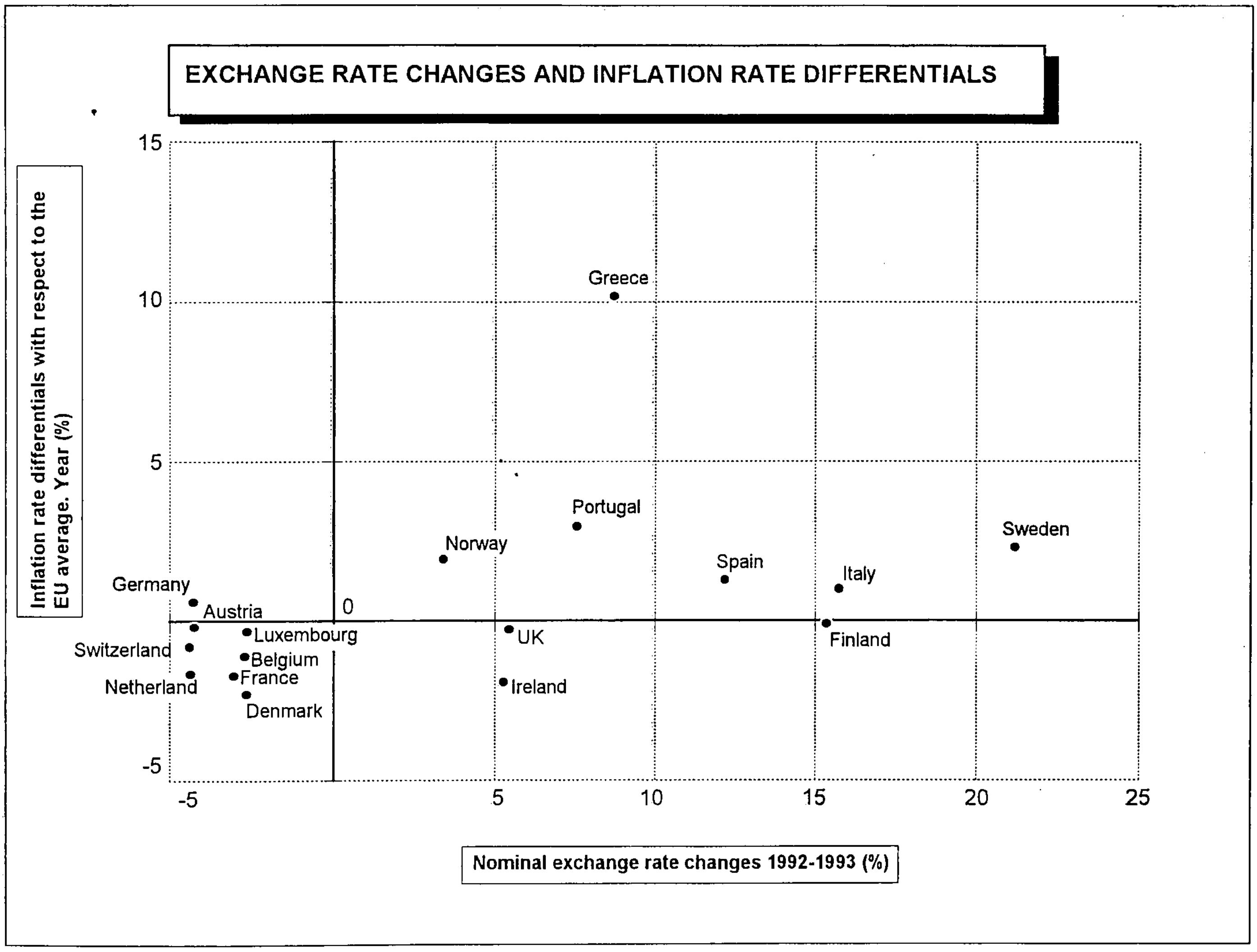
This may explain the strong increase in the presence of tourists in the first group of countries, to the detriment of the second, when one considers the Central-European flows of tourists that do not end up in the seaside resorts of the Mediterranean countries.

Among the Mediterranean countries, for example, only Spain seems to have benefited by the devaluation, and in a much more modest manner so has Greece, while Italy has suffered a slight reduction in the foreign tourism presence both in hotels and in supplementary accommodations. The price advantage has instead favoured Finland and Norway, whose flows of foreign tourists are not however of a great absolute importance. The exchange rate penalty has been felt in Austria and Switzerland, as in almost all the central European countries, where notable reductions in the hotel tourism presence have been registered.

During the course of 1993 these changes in competitiveness have combined with the recession of the major continental economies described above and have thereby penalized the foreign component as was shown by the tourism presence data.

Strictly speaking, the explanatory model based on exchange rates and inflation rate differentials seems to work although it is distorted by cyclical components; it is predictable that the relative repositioning of each country with respect to the rest in terms of foreign flows of tourists is noticeable in 1994 due to the improvement in the economic climate.

Apart from real flows measured in



Source: elaboration based on annual value of currencies and Eurostat data "nights", those countries that have devalued generally have improved their tourism account balance by an increase in monetary receipts and/or by a decrease in payments; the contrary is obviously true for the other cases.

As examples of these two opposing situations, Germany and Italy may be considered. The first has worsened its negative position in the tourism account balance from 4.6 to 5.1% (elaborations based on the average of credits and debits), due, above all to the debits caption (it passes from 28 to 32 trillion ECU) which is not compensated for by the slight increase of credit flows; Italy, on the other hand, has improved its position (from 0.4 to 0.7%), due to an increase in the credit caption (from 17.6 to 18.8 trillion ECU), but above all because of the decrease in the debit caption (from 13,9 to 12 trillion ECU).

Although it has not suffered a reduction in the foreign tourist presence, Italy has increased the monetary value of receipts because of the devaluation. At the same time, Italian tourist flows have been restrained (more than the numbers of monetary value indicate) from venturing abroad because of the devaluation and the resultant decrease in purchasing power.

Finally, considering the countries in aggregate terms, the position of the tourist account balance cancels the domestic balances of opposite sign, and expresses therefore the result of exchange movements with the rest of the world. In this way, one can observe that in all of the EU countries the balance of currency movements went from -605 billion ECU in '92 to +20 billion ECU in '93 since the increase in the credits caption (+3.5%) is higher than the increase in the debits caption (+2.8%). This is a result of both the decreasing propensity of EU citizens to travel abroad and the increasing flows coming from those non-European countries (in particular the United States) already enjoying an economic upsurge.

The group of EFTA countries, excluding Sweden (for which data is not available), instead, has worsened its position (although still structurally positive) and has fallen from +3 913 to +3 729 billion ECU.

This is due to the sum of the less positive balance of Austria and Switzerland (-410 billion ECU) and of the less negative balance of Finland and Norway (which has improved by 348 billion ECU); trends that are completely in line with the preceding analysis of the relative changes of competitiveness which have shifted the flows of tourists, which are most likely Central-European, from one group of countries to another.

Therefore, 1993 was certainly a difficult year for the tourism sector in most of the countries because of the slumping state of the continental economies. From the first available data, changes in exchange rate relationships have affected the flows of tourists in 1994. The devaluation has left practically unchanged the relative positions within some big groups of countries which are homogenous also in terms of attractions and environmental characteristics; in these cases the relative positions will be determined by the reciprocal inflation rate differentials and on the capacity to improve the supply both from the receptive point of view and from the environmental one.

2 DEMAND

2.1 Europe and the international tourism market

For years Europe has been primary tourist destination world-wide. Still today, it covers nearly 60% of the market in terms of international arrivals.

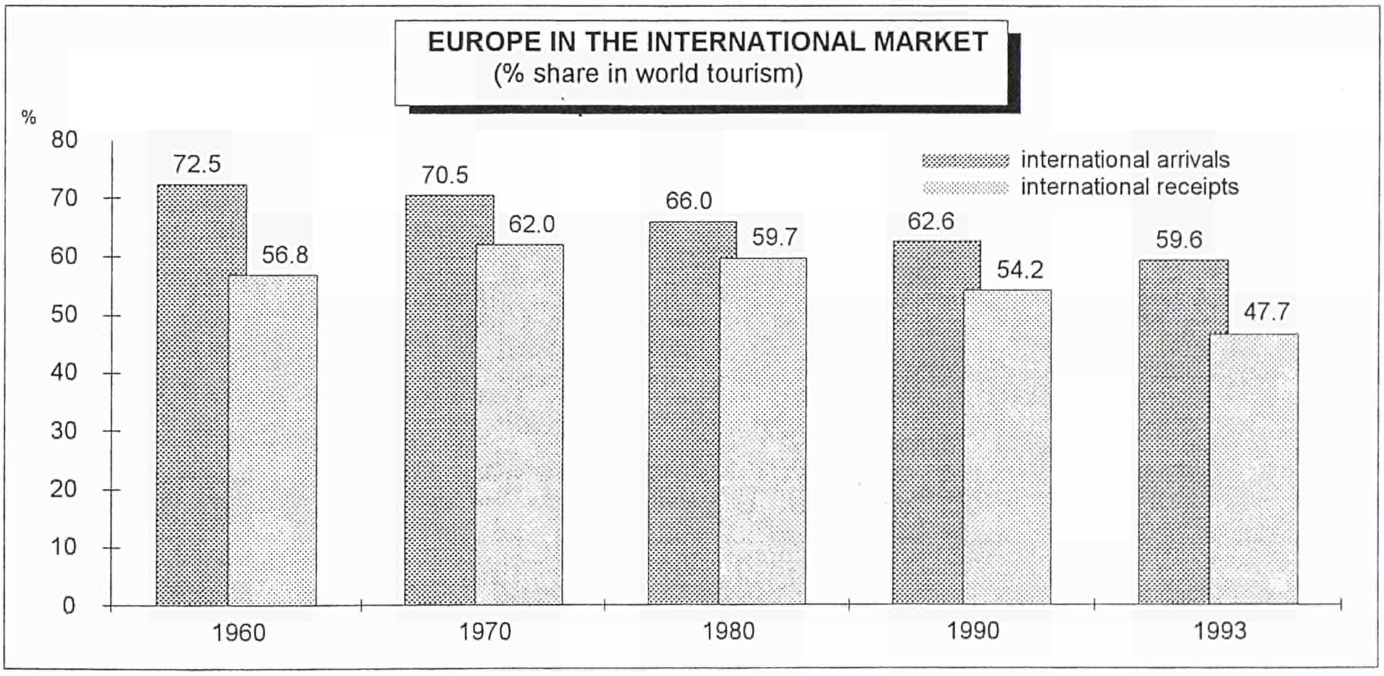
However, it is now clear that this market share is undergoing a process of erosion, and that competition from developing areas is growing steadily. Europe's share of the world market in terms of arrivals passed from 72.5% in 1960 to 59.6% in 1994 (it was 59.3% in 1993). Most of the gain went to the Far Eastern and Pacific regions, whose quota grew from 1% to 14.1%. The American continent, as well as Europe, has also lost out, with its share shrinking from 24.1 to 20.5%.

It is also relevant to note that this erosion of the European share took place at a much faster rate in the period 1990-1994 than in the preceding decade 1980-90. While in the nineteen-eighties the market share diminished at 0.3% annually, the latter four-year period saw it fall off at a yearly average of 0.75%. Europe is having to face international competition which, although in the past may have been somewhat restricted, now promises much more aggression for the future.

1994 appears to have been a more favourable year for Europe. According to WTO data the market share in terms of international arrivals has improved slightly compared to 1993 (59.6% compared to 59.3%).

The most worrying aspect can be seen from a market analysis in terms of receipts. Up until 1990 the share in receipts was declining at a slower pace than the arrivals, demonstrating that tourist spending in Europe was increasing more than proportionally with respect to other areas. However, in the period 90-94 European tourism share decreased more in terms of receipts than of arrivals (6.1%), meaning that tourists in Europe increased their spending capacities less than proportionally to those in other areas.

This last phenomenon is indicative of the new situation that European tourism is now having to face: the greater spending capacity that international tourists have always shown in Europe, with respect to other areas, has, in recent years, no longer been borne out by the facts. The problem for European tourism is that of improving the quality of what it offers and of increased selectivity in its international demand, creating incentive for longer stays in the country of destination.

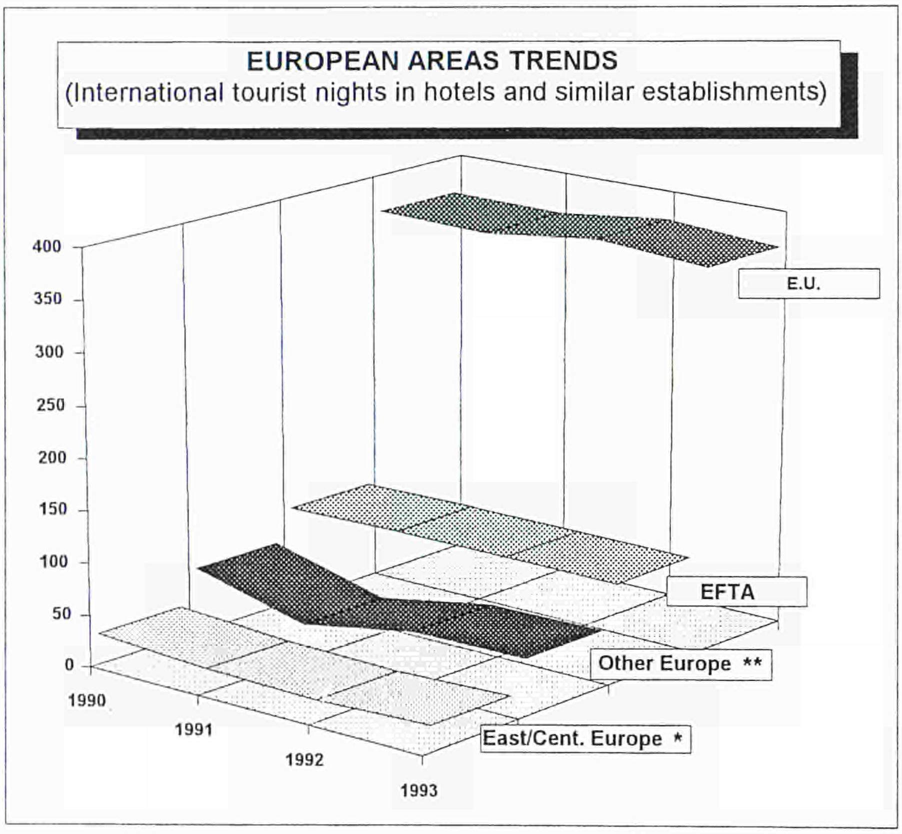


Source: Wto

2.2 Europe at regional level

From analysis of the latest trends in European states and regions, the following points emerge:

1. The trend for nights accommodation for international tourists is reasonably stable in EU countries, with a slight increase of 0.8% for the period 90-93. Confronted with a proportionally larger increase in arrivals, it is reasonable to conclude that average stay time has fallen, a phenomenon that is tending to characterise all countries, which can be attributed to the increasing number of vacations taken and the growth in short trips. A 3.45% increase from 91 to 92 is seen to be followed by a 2.1% decrease from 92 to 93, the year in which the symptoms of the international economic crisis were felt more.
2. Although the situation for EU countries is stable, significant difference, including those in annual trends, are observed for other parts of Europe.
Eastern and Central Europe, following strongly negative trends (-32% from 90 to 92), show a reversal in tendency (+18.5%) for the successive year, which would appear to mark a decisive development of tourism in those countries. The EFTA regions show an overall increase of 2.2%, while for the remaining areas (**Other Europe**), the data are strongly affected by the crisis in ex-Yugoslavian states.
3. Trends in international hotel tourism for single countries show the following situation:



* Bulgaria, Hungary, Poland, Romania, Slovakia

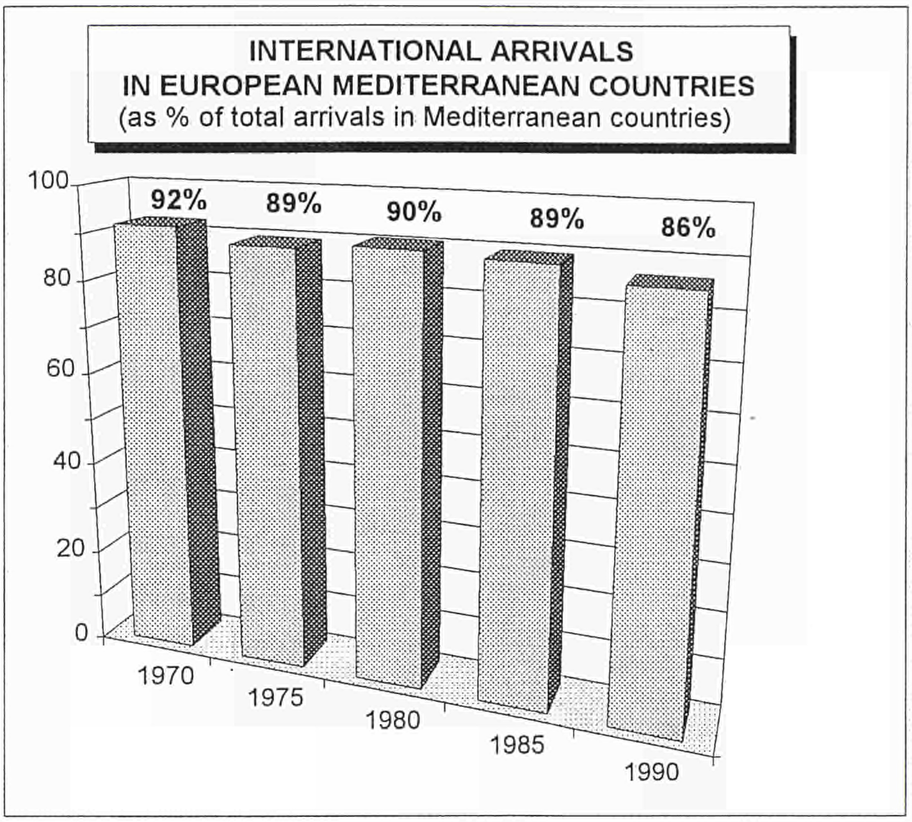
** Croatia, Cyprus, Gibraltar, Israel, Malta, Monaco, San Marino, Slovenia, Turkey, F.R. Yugoslavia

Source: WTO

Countries in the Scandinavia area show very significant average annual growth rates for the period 90-93, with 1993 being a particularly positive year for Norway (a 6.72% increase on 1992), Sweden (+7.27%) and Finland (+16.53%). It is likely that these countries have enjoyed a positive influence from the onset of tourism from ex-Soviet bloc countries, particularly from Baltic states. Denmark shows stability over the same period, with a fall-off in 93, probably due to the revaluation of local currency with respect to many other European currencies.

Germany is showing negative tendencies, strongly affected by the revaluation of the Deutschmark. Tourist nights have fallen off at an annual average of 5.7% in the period 90-93, and dropped 9.4% in 1993. The UK too, shows a negative trend for the same period, although slightly less serious, at an annual average of -2.2%.

A strongly positive trend can be seen for Spain (an average 7% increase over the above three-year period), and Ireland (+4.8%). With 15.1% of the entire market, Spain is consolidating its leading position in European tourism. Ireland, although only having a marginal role (1.75%) in the European tourism market, seems to be gathering the fruit of an incisive promotional policy enacted in recent years. France too, shows a consistently positive trend (3.2% average over the three-years period), despite revaluation of the FF. against many



Source: WTO

European currencies (especially the Pound, Lira and Peseta).

Trends for Greece show stability over the period in question, while Italy suffered a slight decline (1.2%) the last year; the tendency for Portugal was decidedly negative in the period, with a fall in international hotel tourists of over 8% in '93 with respect to '92.

2.3 Mediterranean area

Since the Mediterranean area receives the highest tourist concentration in Europe, the four European countries in the Mediterranean group (Greece, Spain, France and Italy) merit special attention in terms of tourism policies implemented.
Tourist demand in the Mediterranean has the following characteristics:

- great concentration along the coast;
- strongly affected by season;
- largely concentrated in just 3 countries (France, Spain and Italy).

The four European Mediterranean countries have always held a very large share of the tourism market for the entire basin, and this trend is continuing, with 85% of tourists going there. Nevertheless, this share is in considerable decline, which began to show significantly from 1985, when political and military conflict in the area started to diminish.
The future of tourism in the Mediterranean will therefore probably involve a strong increase in competition from non-European countries, for many of which overall economic development will be closely linked with the growth of tourism. This applies to both those countries already operating in the world tourism market (Turkey, Tunisia, Morocco, Egypt), and to those that have yet to organise their offers (for example Syria, Lebanon and the Palestinian area).

Mediterranean countries on the European market (non-resident tourist nights)

	1990		1993	
	N°('000)	European market share[1] %	N°('000)	European market share[1] %
Spain	64 627	14.1	82 872	17.6
France	55 934	12.2	61 298	13.1
Italy	66 012	14.4	62 650	13.3
Greece	35 012	7.6	36 475	7.8
Total	**221 585**	**48.4**	**243 295**	**51.8**
EU+EFTA	**457 215**		**469 695**	

(1) on EU+EFTA countries

Source: WTO and Eurostat

The four European countries in the Mediterranean area show, within the European panorama, overall growth in the three-year period 90-93. The growth trend for Spain and France, stability for Greece and slight decline for Italy, overall represent an increase in market shares for the Mediterranean group within Europe as a whole, currently holding 52% (among EC + EFTA countries) in terms of nights. However, the future is uncertain, and closely linked with the policies on tourism, implemented together and independently, by these countries. Matters central to tourism policies will include:

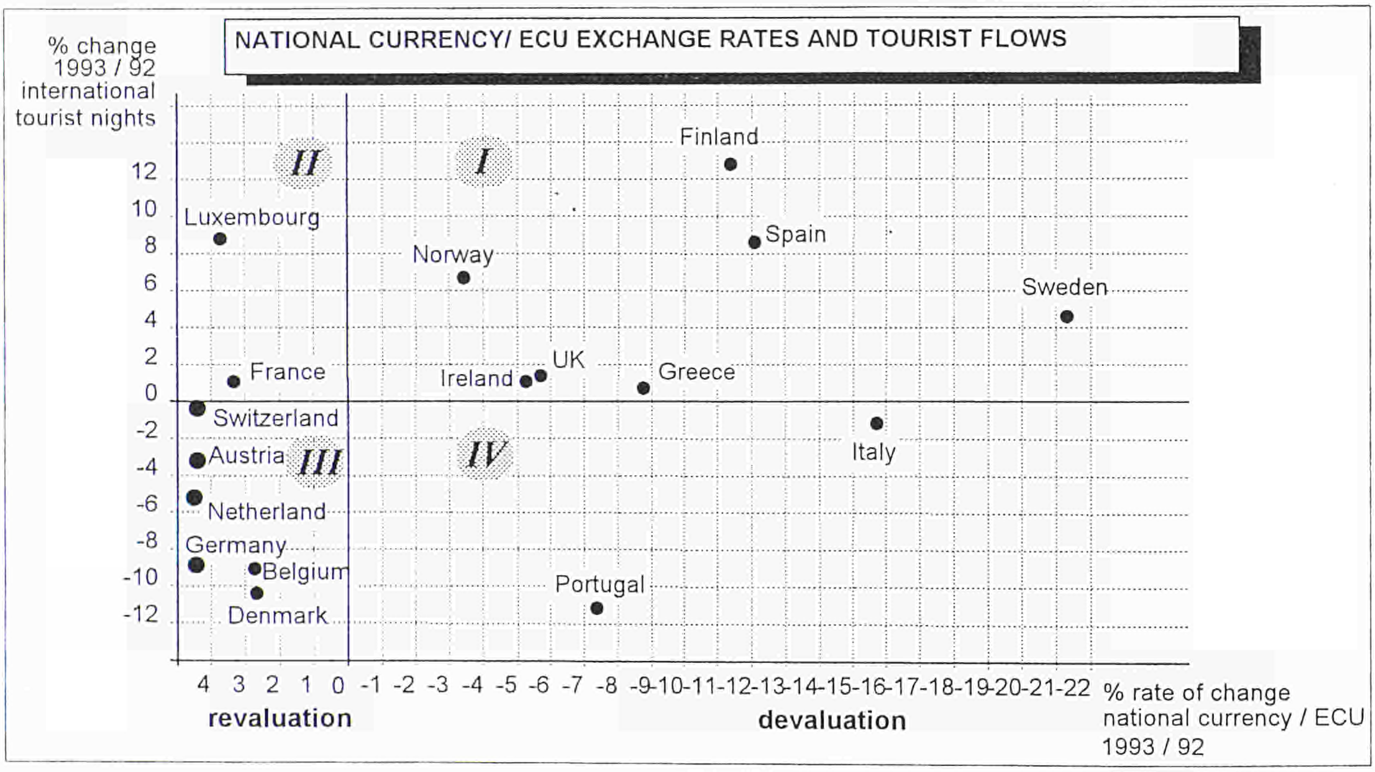
- sea and coastal environment protection;
- decongestion of coast in favour of inland tourism areas;
- quality in accommodation and services;
- management cost control.

The future role of European Mediterranean countries in terms of international tourism will depend on policies for improved quality and segmentation of the supply, while market shares will tend to be measured more in terms of receipts than of arrivals.

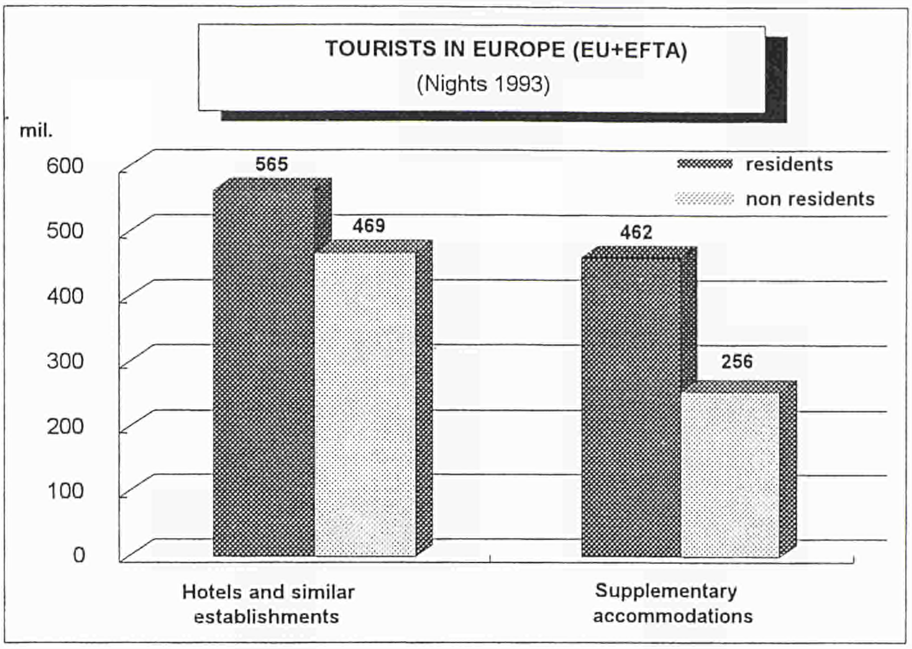
2.4 Tourism and exchange rates

In 1993 tourist movements were significantly influenced by the variations in currency exchange rates after September 1992. Exchange rate fluctuations were felt even more in the 1994 tourist season (not yet fully documented), not only because rates between certain countries widened even further, but also because there was enough time for tourists to consider the new competitive conditions and change their holiday plans for the summer.
The chart here shows variations in international tourist movements for different countries, in function of changes in exchange rate between individual currencies and the ECU. Although it is clear that this situation cannot faithfully represent the competitiveness of each country for international tourism, which depends on exchange rates between single countries, it provides a reliable reference indicator, at least showing competition with respect to the European market as a whole, which still remains the most consistent of markets for each country.
The chart would appear to fully interpret the phenomena which occurred in 1993, which can be summarised as follows:

1) Nearly all countries whose currencies were devalued against the ECU show higher nights quotas for international tourists, sometimes with considerable increases (quadrant I°).
2) Nearly all countries whose



Source: Eurostat and WTO



Source: Eurostat and WTO

2.5 International demand and domestic demand

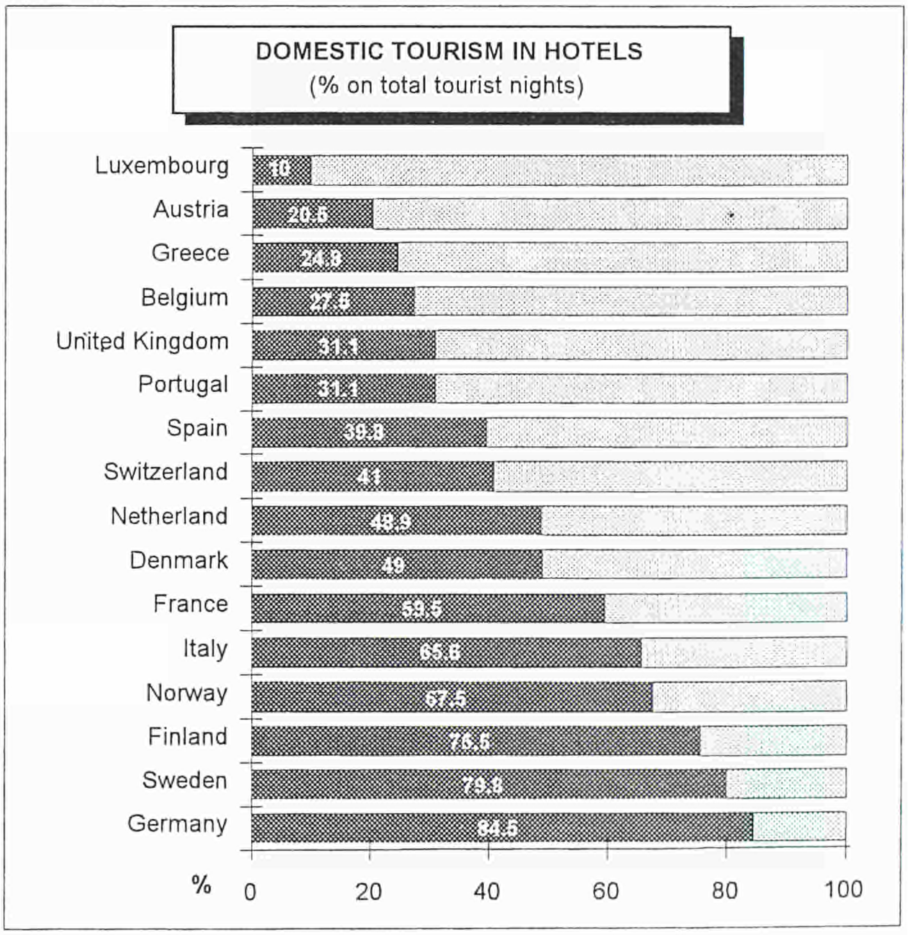
The overall European demand, in terms of nights spent by tourists in accommodation establishments of the commercial circuit, is estimated for 1993 to be around one billion and seven hundred fifty[2]. Of this, 59% is attributable to domestic tourism, the remainder to international tourism. On the basis of the available information, the flows of tourists in supplementary accommodations can be quantified as 41% of the total; this share increases to 64% if reference is made to residents alone. Hotel tour-

currencies were revalued against the ECU show a decrease in tourist nights. The largest fall-off is for Germany, whose currency lays at the origin of the new exchange-rates. (Quadrant III°).

3) Only three exceptions can be seen. Italy, and more negatively, Portugal show declines in tourist movements despite more competitive exchange rates for their currencies. Both countries show substantial recovery in 1994, however. The opposite, positive trend is seen for France, thus confirming its leading position in the world tourism market. Increased competitiveness with respect to American tourism may have contributed to this situation.

The chart largely substantiates the correlation between economic competitiveness and tourist movements.

The correspondence between economic competition and tourist flows is therefore substantially confirmed.



Source: elaboration from Eurostat data

[2] The estimate procedure is rendered necessary by the scarcity of some official data or by the diverse source of some of the data. It must be remembered that the information relating to supplementary accommodation often is not homogeneous. It is reasonable therefore to maintain that the real number is higher.

ism, a more likely destination for the international tourist, is characterized by a greater balance between the two: in fact in this case residents represent 55% of the total. We observe also that, while the relationships cited for supplementary accommodations are substantially equal both for European Union and EFTA countries, in the case of hotels in EFTA countries a decisively higher share has been registered for non-resident tourists.

The relationship between domestic tourism and international tourism is subject to various factors: the proximity to international markets, the availability of a large pool of domestic demand, the development of a tourism policy, and the economic and cultural level of the population on which the propensity to international travel depends. All contribute to determine the frequency of international tourism.

Nights spent by tourists in all types of accommodations, 1993 ('000)

	Resident	Non-resident	Total
Belgium	12 253	11 681	23 934
Denmark	13 830	10 453	24 283
Germany	276 382	34 694	311 076
Greece	12 537	37 108	49 645
Spain	68 512	88 132	156 644
France	153 187	110 909 (1)	264 096
Ireland	n.a.	9 475	-
Italy	169 039	82 594	251 633
Luxembourg	373	2 537	2 910
Netherland	38 991	17 178	56 169
Portugal	13 458	17 831	31 289
United Kingdom	157 900 (2)	180 100	338 000 (2)
EU 12	**916 462**	**602 692**	**1 519 154**
Norway	11 941	6 882	18 823
Austria	24 306	70 494	94 800
Switzerland	38 142	36 729	74 871
Finland	9 738	2 929	12 667
Sweden	26 000 (2)	6 060	32 060 (2)
EFTA	**110 127**	**123 094**	**233 221**
TOTAL	**1 026 589**	**725 786**	**1 752 375**

(1) Campings only (except Île de France)
(2) Estimate

Source: Eurostat - WTO

Among the countries in which the greatest frequency of domestic tourism in hotels is found (because of the fragmentary nature of the data it is advisable to take into consideration only the most organized system of accommodations, that is the hotel system) we find in first place Germany (84.5%) followed by a group of three Scandinavian countries. The geographic and climatic conditions of these countries explain the lower frequency of international tourism. The situation in Italy is, however, different (65% domestic hotel tourism); it is only recently that the tourism demand has begun to consider international destinations.
In last place we find countries of small size (Austria and Belgium, for example) where it is easier to cross the borders, and countries where the domestic demand for tourism is still rather low (Greece and Portugal).

2.6 Development from 1992 to 1993

As has been observed, during 1993 the overall demand for tourism in EU and EFTA countries has suffered a reduction in terms of nights (-1.8%). The decrease is slightly less for tourists who have chosen hotels (-1.6%) as compared to those who have chosen supplementary accommodations (-2.0%); similarly the difference is slightly less for international tourists (-1.6%) as compared to domestic tourists (-1.9%). However, in the case of hotel tourism, the reduction has been confirmed for domestic tourists only (-3.0%) while for international tourists there has been no change. This phenomenon is explained by the fact that domestic demand (in which vacation tourism has the great-

Nights spent by tourists by type of accommodation 1993 ('000)

	Hotels and similar establishments			Supplementary accommodations		
	residents	non-residents	Total	residents	non-residents	Total
EU 12	505 857	377 534	883 391	410 605 [1]	225 158 [2]	635 763
EFTA	58 975	92 161	151 136	51 152	30 933	82 085
TOTAL	**564 832**	**469 695**	**1 034 527**	**461 757**	**256 091**	**717 848**

(1) Concerning France: campings only (except Île de France)
(2) Estimate

Source: Eurostat - WTO

est weight) is more sensitive to economic crises as compared to international demand.
The countries which have felt the greatest decline in demand are Belgium (-13.3%), Portugal (-7.2%), and Denmark (-5.47%). However, the countries that have greatly increased their overall flows, besides Luxembourg (8.9%) whose role in the tourism market is of a particular nature, are the following: Sweden (8.5%), Finland (6.7%) and Spain (6.3%). The Scandinavian countries have therefore registered high performances both on the foreign and domestic markets. This latter fact is probably due to a shift from flows that were once towards international destinations to national destinations. As a result consumption has contracted due to the economic crisis and the respective currencies have been devalued.
Domestic tourism also seems to show a close correlation with the devaluation of the currency, even though it is less obvious than in the case of foreign tourism, since it is also more sensitive to other phenomena. As was already shown for international flows, the graph relates national currency variations with respect to the ECU, the average of European currencies, and the 1992/1993 variation of nights among resident tourists. It is apparent that the economic law is substantially confirmed; the revaluation of the currency results in a decrease in domestic nights due to the propensity of tourists in one country to look for more economical solutions abroad (particularly in those countries that have witnessed an inverse monetary variation), while the devaluation results in an increase in domestic demand as a response to the decreased purchasing power abroad.
As was seen previously in the case of international flows, two countries diverge from the rule: Italy and Portugal. Added to these are the United Kingdom and Luxembourg, the latter of which however, due to its particular characteristics, is subject to different variables.
In the light of the considerations developed up to this point and on the basis of the analysis of the 1993 tourism trends, the following conclusions may be drawn:

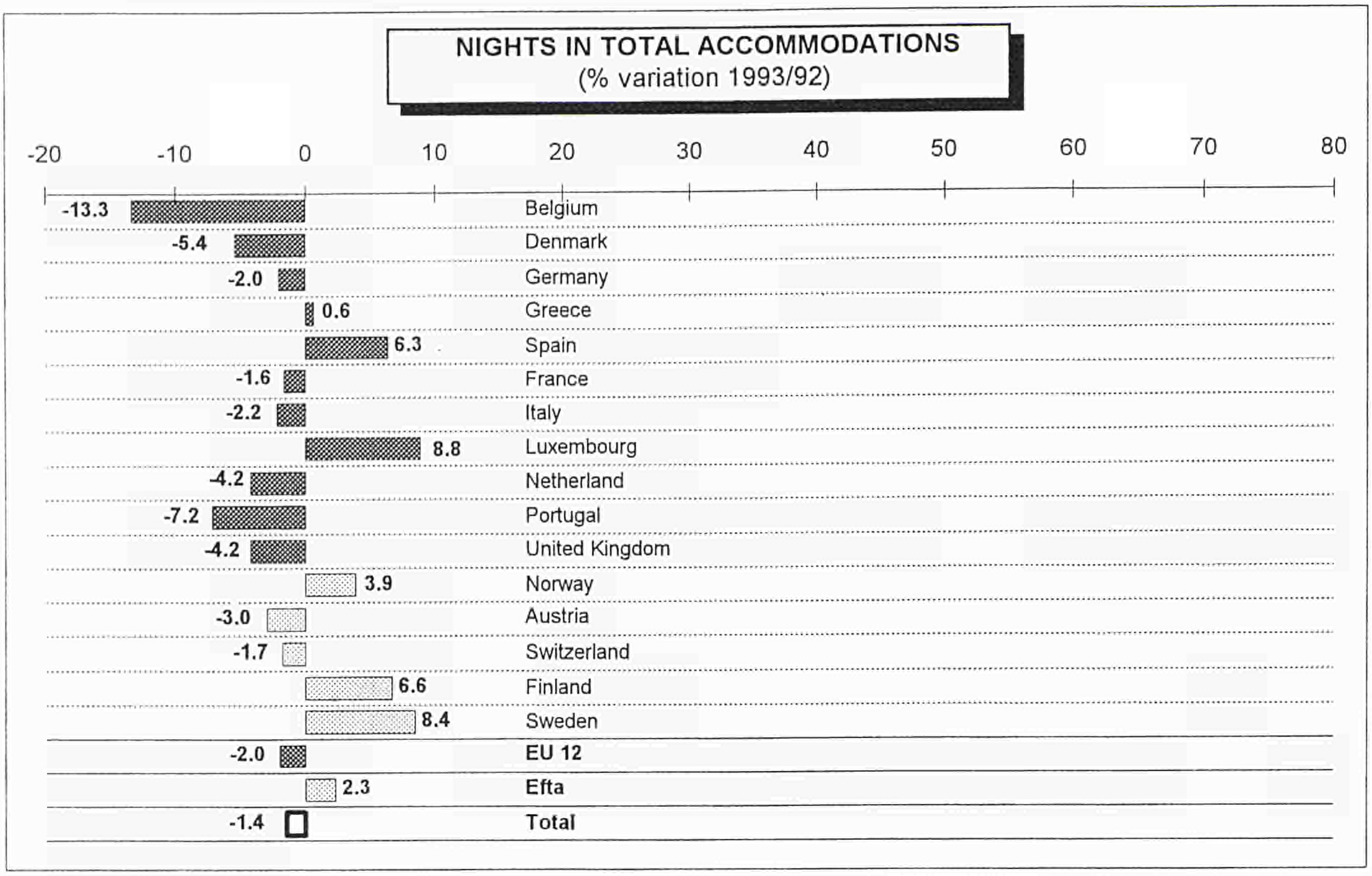
1) the European Union has witnessed the effect of the economic crisis which has been manifested in an

Nights spent by tourists. Variation 1993/1992 (%)

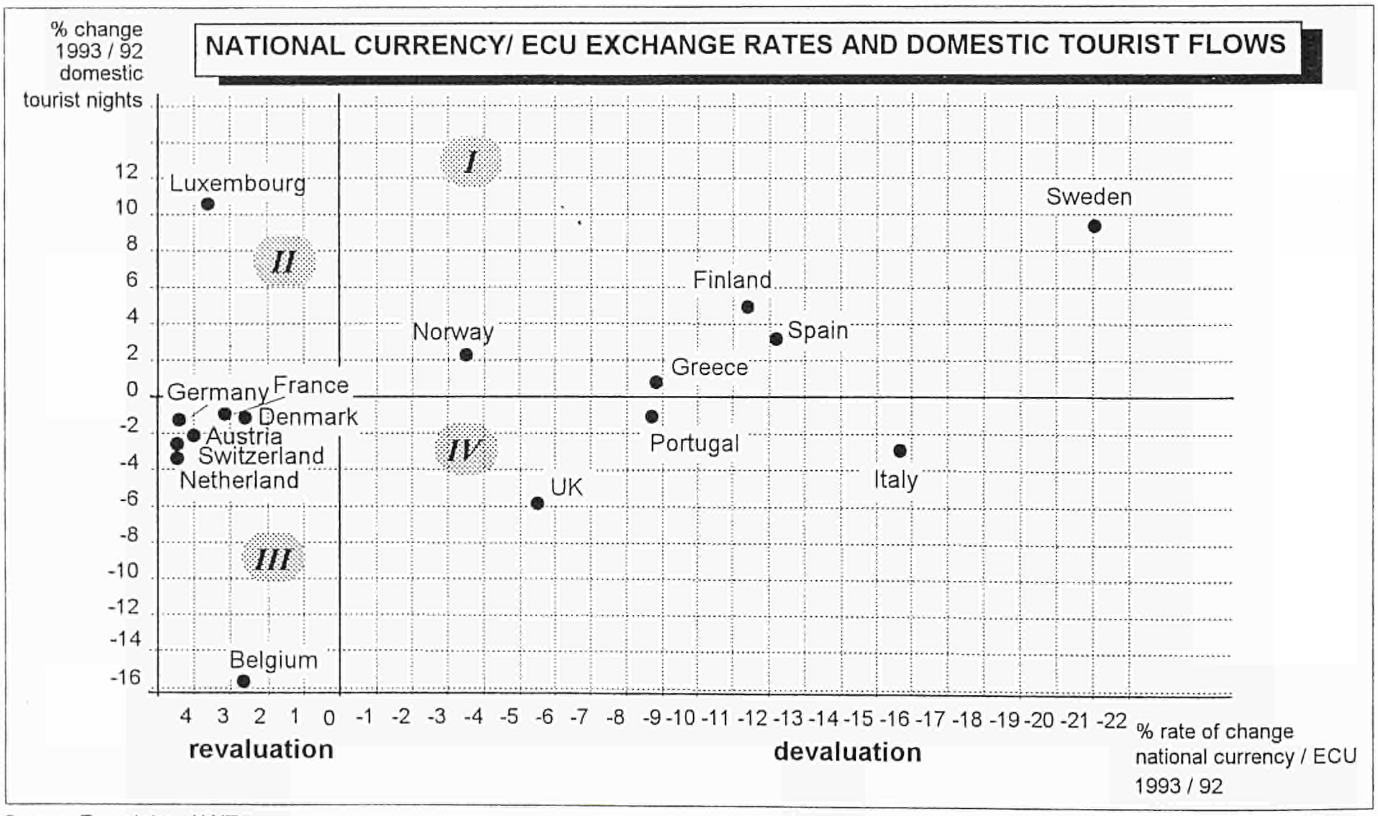
	Hotels and similar establishments			Supplementary accommodations		
	residents	non-residents	Total	residents	non-resident	Total
EU 12	-3.37	0.51	-1.75	-1.11 [1]	-4.83 [2]	-2.46
EFTA	0.68	-2.06	-1.01	2.67	-0.27	1.54
TOTAL	**-2.96**	**0.00**	**-1.64**	**-0.71**	**-4.30**	**-2.02**

(1) Concerning France: campings only (except Île de France)
(2) Estimate

Source: Eurostat - WTO



Source: Eurostat and WTO



Source: Eurostat and WTO

overall decrease in tourist activities in terms of nights, and even more so in monetary terms;

2) the Scandinavian countries seem to have reacted positively to the effects of the crisis and seem to be gathering at the present time the fruits both of the opening of Eastern European markets to exchange and of a more incisive tourism policy;

3) among the countries in a dominant position, only Spain is continuing along its strong overall growth trend, showing that it knows how to derive profit from the devaluation of its currency by increasing its own domestic (3.7%) and international (8.6%) flows.

4) Italy and Portugal are in a critical position with regard to the evolution of the market. For these two countries difficulties of a structural nature have emerged since an increase in flows has not accompanied their improved economic competitiveness.

2.7 Utilization of hotels and similar establishments

The less than brilliant trend of 1993 tourist activities is evidenced also by the utilization levels of hotels and similar establishments. In almost all the countries in fact, a decrease in the use of beds in such establishments has been registered when considering either the gross usage or the net usage (that is excluding the periods in which the hotels are closed). Only Portugal is an exception; its negative year was preceded by another negative year of similar magnitude. It can be observed in fact that from 1990 to 1993 the gross usage rate has fallen from 37% to 34% although a slight recovery has taken place during the last year.

The comparison between the usage levels of the different countries is highly variable; among the countries with a low gross usage rate are those which receive most visitors in the summer months because either the main resource is the sea and the coast (Italy and Greece), or because the climate is a determinant factor (Sweden and Finland). Particularly high gross usage rates are registered in Spain, Switzerland and Denmark (in this case however it must be remembered that only those hotels with over 40 beds have been surveyed).

The net usage rate expresses the capacity to utilize more fully establishments during the periods in which they are open for business. In this case the highest levels coincide with countries that have the best performances in the international tourist market (France and Spain above all). The situation however, seems to be critical in Belgium, a country that presents a very low net usage rate.

2.8 Particular countries aspects

Netherlands

In 1993 Dutch tourism registered an obvious decline in foreign tourism (-8.6%) and, on the other hand, an increase in domestic tourism. The arrivals of foreign tourists, over 50% of whom come from Germany and the United Kingdom, have decreased more than the nights which indicates nevertheless that foreign tourists tend to stay longer in the Netherlands. This constant tendency of the last few years is the fruit of a tourism policy that offers alternatives to the basic visit to Amsterdam, through new initiatives justifying a lengthening of the stay and through a diverse product supply.

The first months of 1994 indicate that the arrivals trend is recovering.

The vacation rate (at least 4 nights) of the Dutch is one of the highest in Europe (70.3% in 1992).

United Kingdom

In the United Kingdom a decrease has been registered above all in domestic tourism; in fact, in this case both nights and arrivals have decreased. On the other hand, however, international arrivals have increased, but the average length-of-stay has decreased (from 3.8 days to 3.3). All the same, however, overall tourist

Hotel and similar establishments: net utilization of bed-places in % (1990-1993)

	Net utilization			
	1990	1991	1992	1993
Belgium	31	29	29	28
Denmark*	35	36	38	36
Germany	39	40	39	37
Greece	60	56	62	57
Spain*	n.a.	n.a.	36	37
France	n.a.	n.a.	60	56
Ireland	n.a.	47	47	n.a.
Italy	41	42	41	40
Luxembourg	n.a.	n.a.	n.a.	n.a.
Netherlands	39	38	38	34
Portugal	51	52	46	48
United Kingdom	46	41	38	39
Norway	35	36	36	37
Austria*	n.a.	n.a.	34	33
Switzerland	45	45	43	42
Finland	36	32	30	33
Sweden	n.a.	31	27	27

* gross rate

Source: Eurostat

expenses have increased; in 1993 the average daily expenses of a UK resident tourist were UK £ 33.06, approximately 24% more than in 1992. In addition the overall expenses of overseas visitors increased by 16.5% (in 1992 the average daily expenses were UK £ 41.9.)

Approximately 50% of the visitors to the UK come from the European Union (France and Germany above all) and the other 50% from the rest of the world.
Scotland is the region experiencing the least reduction of flows; while nights have decreased slightly a considerable increase in trips has been registered.

France

The tourism sector in France represents almost 12% of GDP. It does not appear that the growth trend will slow and even in 1993, although an overall reduction in nights has been registered, an increase in flows coming from abroad has taken place.

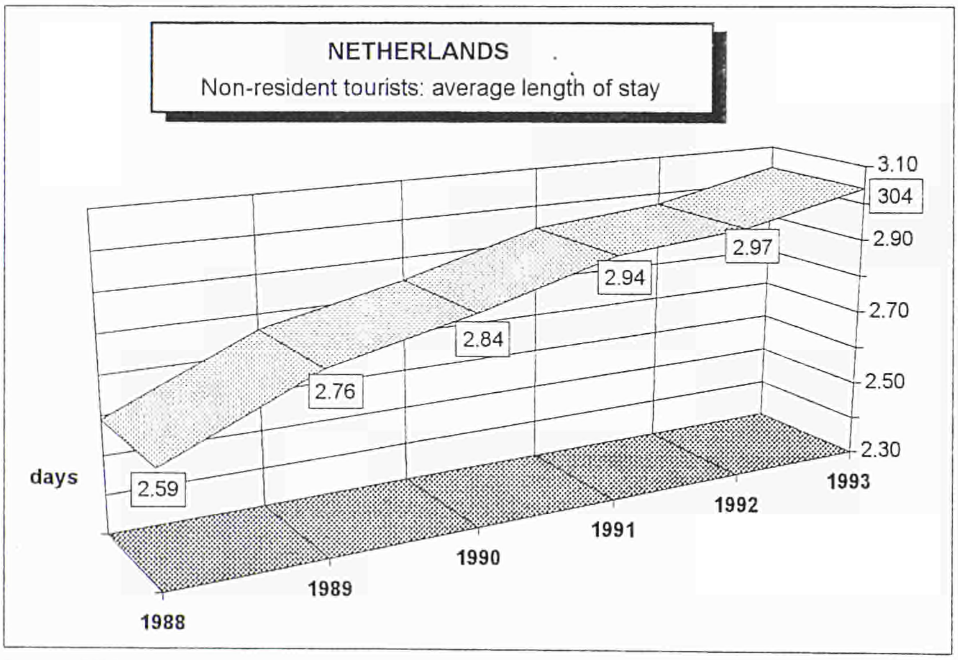
The economic significance of tourism in France amounted to 1,737 billion French francs in 1993 (approximately 262 billion ECU); since 1989 it has grown at an average annual rate of 4.4%. The tourism account balance in 1993 was positive by approximately 9 billion ECU.
In 1992 the average vacation rate of the French reached 60%; 20% of the French spend their vacations abroad, a level that seems to be rather stable. Eighty-two percent of foreign tourists come from the European Union. The country of origin with the greatest number of tourist visitors to France is Germany with almost a 22% share.

Italy

In 1994, there was a 6,2% increase in Italian tourist flow in terms of tourist presence, mainly due to the devaluation of the LIT, the entity of which nevertheless was considerable.
Instead, in 1993, inspite of a strong devaluation of the LIT, especially compared to the DM, from which country the greatest amount of international tourist flow originates, there was no increase in tourist presence. In other words: the increase of international tourism in Italy was not on the whole proportional to the competitive advantage obtained, which evidences some problems of a structural nature regarding Italian tourism. In particular two relevant phenomena give this evidence:

1) the substantial stability of international flows of the past several years (except for 1993) as compared to the consistent increases of all the major countries (during the period 1985-1992 the average rate of increase of international arrivals was 0.62%, the lowest in the world!);
2) the growing demand for foreign tourism on the part of Italians who thereby detract domestic demand from the tourist system (the growth rate of the expenses of Italians abroad in the period 1985-1992 was 32.8%, the highest in the world!).

Not even 1993, a year particularly favourable to the economic situation of the country, brought about positive signals; these are, however, expected for 1994. The first signs indicate, in fact, that the 1994 growth forecast will be around 3%. This is attributable to 5% for foreign tourism and to less than 2% for domestic tourism.
The fact remains that the tourist system must rediscover the conditions for competition. This process implies reorganization is necessary in order to bring about a greater efficiency in the entire supply system.
Finally, it must be pointed out



Source: CBS

that in 1992 a vacation rate equal to 54.9% was registered, a level slightly less than the preceding year (55.3%).

Portugal

1993 will be remembered as one of the worst years for Portuguese tourism. In some regions, such as the Algarve, the major tourist area of the country, the drop in hotel occupation was very significant causing the whole system of businesses which operate in the sector to experience elements of crisis. In this country, as well, the fruits of competitive advantage have not been gathered.

It is difficult to indicate clearly what the causes of this are since they are in all likelihood of a diverse nature. Above all, the country, given its greater structural weakness, has felt the international economic crisis much more heavily than others, which has therefore impacted the domestic demand. In second place, the country has probably begun to feel the effects of the heretofore disorganized development of the tourism industry, which has been founded more upon the growth of the building industry than on an organic development of services. As a result the overall quality level of the services industry has begun to show itself as lacking. Finally, an overall strategy in the country seems to be missing since there is no full agreement between the various decision making centres in which policy is made.

1994 indicates a positive trend is underway although its size is still not quantifiable.

Germany

In Germany the tourist industry represents approximately 5% of GDP; occupation is estimated at approximately 2 million.

As is known, the country represents the biggest and strongest outbound tourist market not only at the European level, but at the world level. It is not surprising then that the balance presents a significant deficit which reached its peak in 1993 with 43 billion DM. 77% of the receipts are in Europe (the Netherlands, Austria and France are the countries with the highest shares). Foreign visitors have consistently declined since 1991; all the same the decrease has been noted in the old Lander since with the new, even in the last year, an increase (10%) has been registered. However, the new Lander represent in terms of bed nights only 10% of the tourist flows, which are almost entirely domestic. Even the length-of-stay tends to be shorter. In 1993 that of domestic tourists was 3.6 days, while that of foreigners was 2.3 days.

Spain

In 1993 Spain has consolidated its leading position in the European market.

In fact, it has fully drawn gains from the competitive advantages derived from the devaluation of Peseta with respect to the main north-Europe national currencies.

Balearic Islands are the favourite destination of foreign tourists (28.1%), Valencian region (18.9%) and Cataluña (18.4%) follow.

Domestic tourism trend is increasing, too.

In the first half of 1994, the rate of departure for vacation purpose of Spaniards was 52.5%. But only the 6.7% of them prefers an overseas destination.

3 SUPPLY

3.1 Introduction

In Europe the offering to tourists consists of establishments that are very different in terms of size and in services offered; accommodation facilities include hotels and similar establishments and supplementary accommodation establishments; catering establishments for the dispensation of food and beverages include restaurants, coffee-bars and public-houses; travel agencies include substantially, in addition to tourist agencies, tour operators. This paper briefly analyzes the structural changes that have taken place during the last four years, and in particular with respect to the receptive establishments most closely involved in the provision of services to tourists and travellers (hotels, similar and supplementary accommodations).

3.2 Tourist accommodation establishments

With the term tourist accommodation establishments is intended the pool of receptive facilities used by tourists and travellers. Thus, it includes not only hotels and similar establishments but also the so-called supplementary accommodation establishments such as camp-sites, tourist villages, holiday dwellings, group tourism accommodations and specialized accommodations. While for hotels and similar establishments the existing yearly statistics are fairly complete and cover all the European countries, for supplementary accommodation establishments information is gathered in a much more irregular and less exhaustive manner. The comparison over time of the whole of accommodation establishment data necessarily reflects this state and therefore must be taken with due caution.

In 1993 the number of accomm tion establishments present ir European Union was approxim 377 000 and more than 128 0(

Number of tourist accommodation establishments, 1989-1$

Country	1989	1993	% variatior
Belgium	3 485	2 746	-21.2
Denmark	1 022	1 097	7.3
Germany	47 985 [1]	50 958	6.1
Greece [2]	6 868	7 839	14.'
Spain [3]	110 598	133 913	21
France	88 049	85 233	-3.2
Ireland	928	2 826	n. c
Italy	61 853	53 421 [4]	-13.6
Luxembourg	538	541	0.5
Netherlands	3 138	3 159	-0.7
Portugal	1 908	2 003	4.9
United Kingdom [5]	39 714	33 414	-15.9
EUR 12	**366 086**	**377 052**	**3.0**
Norway [6]	1 897	1 957	3.1
Austria ·	22 921	21 656	-5.5
Switzerland [7]	100 803	100 126	-0.7
Finland	1 394	1 609	15.4
Sweden	3 080	3 075 [8]	-0.2
EFTA	**130 095**	**128 423**	**-1.3**
TOTAL	**496 181**	**505 475**	**1.9**

(1) Excluding campings and tourist villages
(2) Excluding holidays dwellings and group tourism accommodations
(3) Excluding tourist villages, groups tourism accommodations and specialized accommodations
(4) Figure on supplementary accommodations refers to 1992
(5) Hotels and similar establishments only
(6) Concerning supplementary accommodations the only figure available refers to campings
(7) Excluding holiday dwellings, group tourism accommodations and specialized accommodations
(8) Datum refers to 1992.
(9) The analysis of the available data suggests that it could have been a different criterion for data colle(over the period

Source: Eurostat

the EFTA countries. Comparing this data with that of 1989, one finds there is a moderate increase (+1.9%) in the number of establishments present in European territory taken overall (EU+EFTA); however while the European Union has experienced a rather limited increase (+3%), EFTA has suffered a slight decrease (-1.3%). The countries that have shown the strongest increases are, in the EU, Spain (+21% due in large part to the increase in camp-sites and holiday dwellings) and Greece (+14.1%, due almost entirely to the increase in hotels and similar establishments) followed by Denmark (+7.3%) and by Germany (+6.1%), and, for EFTA, Finland[3] (+15.4%). Belgium, the United Kingdom and Italy have instead suffered the greatest decreases; these are respectively 21.2%, 15.9%, and 13.6%.

Bed-places in tourist accommodation establishments, 1989-1993

Country	1989	1993	% variation
Belgium	570 196	607 291	6.5
Denmark	287 460	351 734 (1)	22.3
Germany	1 801 035	2 606 072	44.7
Greece	510 676	590 969 (2)	15.7
Spain	1 724 810	2 030 684	17.7
France	4 066 268	4 686 812	15.3
Ireland	48 103	60 849 (3)	26.5
Italy	3 178 035	3 306 977 (4)	4.0
Luxembourg	28 208	n.a.	-
Netherlands	782 407	795 236	1.6
Portugal	437 376	475 594	8.7
United Kingdom	971 021 (4)	876 150 (5)	-9.7
EUR 11 (6)	**14 377 387**	**16 388 368**	**14**
Norway	118 199	136 163	12.2
Austria	747 138	740 855	-0.8
Switzerland	1 143 739	1 101 299	-3.7
Finland	107 428 (3)	145 860	35.7
Sweden	215 408	227 828 (5)	5.8
EFTA	**2 331 912**	**2 352 005**	**0.9**
TOTAL	**16 709 299**	**18 740 373**	**12.1**

(1) Concerning supplementary accommodation the available figure refers to campings only
(2) Bed-places in supplementary accommodation refer to 1992
(3) Hotels and similar establishments and campings and tourist villages only
(4) Hotels and similar establishments only
(5) Datum refers to 1992
(6) Excluding Luxembourg

Sorce: Eurostat

Overall in 1993 the number of beds in the EU was circa 16.4 million and in EFTA 2.3 million; this is an increase over 1989 of 14% and 0.9% respectively. In the EU the most lively increase in the sector's receptive supply took place in Germany (+44.7%), followed by Ireland (+26.5%) and by Denmark (+22.3%). In the EFTA countries Finland registered an increase of 35.7% in available beds, followed by Norway with an increase of 12.2%.

3.3 Hotels and similar establishments in 1989 and 1993

In 1993 the number of hotels and similar establishments amounted to more than 150 000 units in the countries of the EU and more than 29 000 in EFTA countries. A comparison of this data with that of 1989 confirms the overall declining trend of last few years in the number of establishments present in European territory; the reduction amounts to 4.9% in the EU and 5.1% in EFTA. This overall trend reflects only partially that which has occurred in the individual countries belonging to the two European economic areas. In fact, within the EU, a group of countries may be identified

[3] In 1993 Finland proceeded to revise its statistics. Consequently, data relating to that year are not fully compatible with those concerning previous years.

for which there has been a rather large reduction in units (15.7% in the United Kingdom, 13.6% in Italy and 10% in Belgium), a more numerous group in which the changes have been more contained both in terms of decreases and in terms of increases (Germany - 3.2%, Spain -1% and France +2%, Luxembourg +1.2%) and a group where a substantial growth in the number of establishments has taken place (Denmark +8.5%, Greece +14.6%, Ireland +11.3% and the Netherlands +9.9%). In the EFTA countries the same differences in trends can also be noted with two countries exhibiting strong growth (Finland +18%, and Norway +7.5%) and two others notably declining (Austria -6.5% and Switzerland - 7.2%).

The differences among the countries are not easy to interpret since they depend on the characteristics of the tourism system of each (in the first place is establishment size) and on the policies of the most recent years. The growth in the number of establishments, in fact, must be evaluated on the basis of a wider time frame than that usually considered for cyclical trends. Thus the growth in the number of hotels in Ireland, Finland, Denmark, Norway and Greece seems to reflect the overall development of tourism in these countries, which are to be considered as emerging on the market. The decline in the number of hotels in countries where the development of tourism is "mature" such as the United Kingdom, Italy, Belgium, Austria and Switzerland seems to reflect a rationalization in the tourism offering, characterized by an expulsion of the lesser entities.

The number of beds in 1993 amounted to 7.4 million in the EU and to 1.3 million in EFTA countries with an increase when compared to 1989 of respectively 9.8% and 4.4%. In the EU the most spectacular growth in the receptive offering took place in France where the number of available beds grew by 30% with respect to 1989. Among the other countries there are at least four in which the increase in the number of beds is around 20% (Greece, +17.9%, Ireland +20%, the Netherlands +21.8% and Portugal +18%). The only de-

Number of hotels and similar establishments, 1989-1993

Country	1989	1993	% variation
Belgium	2 105	1 888	-10.3
Denmark [1]	531	576	8.5
Germany	37 873	36 646	-3.2
Greece	6 555	7 510	14.6
Spain	9 883	9 734	-1.0
France	20 239	20 654	2.0
Ireland	865	963	11.3
Italy	36 423	34 870	-4.3
Luxembourg	399	404	1.2
Netherlands [2]	1 544	1 698	9.9
Portugal	1 701	1 777	4.5
United Kingdom	39 714	33 414 [4]	-15.7
EUR 12	**157 832**	**1 501 134**	**-4.9**
Norway	1 101	1 184	7.5
Austria	19 992	18 693	-6.5
Switzerland	6 895	6 309	-7.2
Finland [3]	1 031	1 217	18
Sweden	1 712	1 744 [4]	1.9
EFTA	**30 731**	**29 147**	**-5.1**
TOTAL	**188 563**	**179 281**	**-4.9**

(1) Statistics cover only establishments with at least 40 bed-places
(2) Statistics cover only establishments with at least 20 bed-places
(3) In 1993 there was a revision of statistics in Finland (therefore 1993 data are not fully comparable with data on previous years)
(4) Data refer to 1992

Source: Eurostat

crease, of a somewhat significant magnitude, was measured in the United Kingdom (-9.8%). As far as the EFTA countries are concerned, Finland has registered a noteworthy increase in the number of available beds (+46.3%); this number, is, however, difficult to interpret since in 1993 Finland revised its statistics and as a consequence the data of that year are not fully compatible with those concerning the previous years. The other EFTA countries have reported highly variable increases from 16.9% in Norway to 2.6% in Switzerland. The only country that has measured a slight divergence, (-.9%) was Austria.

In spite of the changes that have taken place during the last four years, the big countries remain obviously at the top of the chart as far as receptive capacity is concerned both in terms of the number of hotels and similar establishments and in terms of the number of available beds.
With respect to 1989, in 1993 Germany and Italy, in spite of the variances measured in both countries, surpassed the United Kingdom in terms of the number of establishments. Together with France, these countries constitute 83.6% of the total hotels present in the EU (in 1989 it was 85%). In the EFTA area Austria alone represents 64% of the hotels and similar establishments of the territory (as in 1989).
As far as the number of beds are concerned, the three big countries which represented 58.3% of the EU total, that is Germany, France and Italy, confirm their position with 59.8% in 1993. Italy went from 24.7% in 1989 to 23% in 1993, Germany confirmed 17.7% and France (the country with the highest increase +30.4%) went from 15.9% to 18.9%. In the EFTA area Austria, which represented 51.4% of the beds in 1989, in spite of the slight decline that was measured and the spectacular increase in Finland, has confirmed its first place position with 48.8% of the available beds.

Bed-places in hotels and similar establishments, 1989-1993

Country	1989	1993	% variation
Belgium	92 543	108 205	16.9
Denmark	85 014	97 034	14.1
Germany	1 191 000	1 322 963	11.1
Greece	423 790	499 606	17.9
Spain	918 649	1 009 241	9.9
France	1 082 138	1 410 706	30.4
Ireland	45 097	54 111	20
Italy	1 678 910	1 720 637	2.5
Luxembourg [1]	14 554	15 112	3.8
Netherlands	109 195	133 030	21.8
Portugal	168 437	198 862	18
United Kingdom	971 021	876 150 [2]	-9.8
EUR 12	**6 780 348**	**7 445 567**	**9.8**
Norway	105 286	123 136	16.9
Austria	656 936	651 003	-0.9
Switzerland	277 519	270 409	2.6
Finland	83 973	122 890	46.3
Sweden	153 286	166 197 [2]	8.2
EFTA	**1 277 356**	**1 333 635**	**4.4**
TOTAL	**8 057 704**	**8 779 202**	**9**

(1) Estimate on the basis of: (a) the number of bedrooms for 1989 and 1991 and (b) the average value of beds per rooms (1.84) as reported by Eurostat, "Tourism in Europe - Supply"
(2) Data refer to 1992

Source: Eurostat

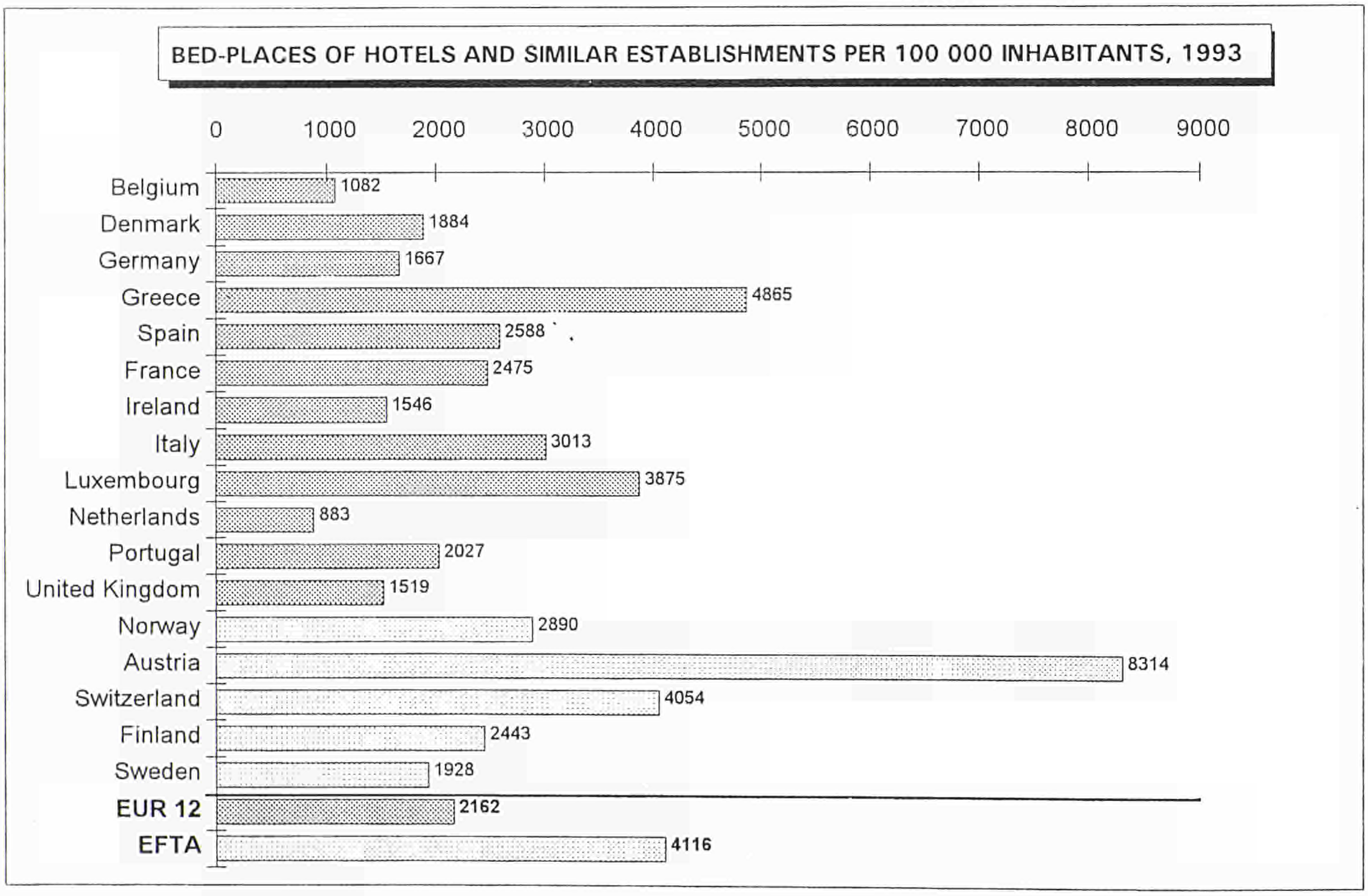
3.4 Variation in the structure of hotels and similar establishments

In relative terms, that is when comparing the absolute numbers with the population of the various countries, with a 1993 European average of

2 162 beds for each 100 000 inhabitants (1974 in 1989), the country with the highest receptive density continued to be Greece with 4 865 beds for each 100 000 inhabitants (they were 4 238 in 1989), followed by Luxembourg with 3 875 beds (they were 3 830 in 1989), by Italy with 3 013 beds (2 916 in 1989) and by Spain with 2 588 beds (2 362 in 1989). In the EFTA area the country with the highest receptive density was again Austria with 8 314 beds for every 100 000 inhabitants (they were 8 576 in 1989), followed by Switzerland with 4 054 beds (4 161 in 1989).

The most interesting information is that relating to the average number of beds by receptive structure which gives information on the average size of the hotels and related establishments in a given country. In the EU the average number of beds per hotel and similar establishments in 1993 was 49.6 (it was 42.9 in 1989). The country with the highest average was Denmark with 168.5 beds per hotel, but one must remember that the official statistics are based only on surveys of hotels and similar establishments with more than 40 beds, followed by Portugal (111.9) and Spain (103.7). Other countries greatly over the average are the Netherlands (78.3), France (68.3) and Greece (66.5). Particularly restrained are the average sizes of hotels in the United Kingdom (26.2). In 1993 in the EFTA area the average size was 45.7 beds per hotel (it was 41.6 in 1989). Those with size very much over the average are Norway (104) Finland (101) and Sweden (95.3), countries that are emerging on the tourist market, and more contained in Austria (38.4) and Switzerland (42.9), countries with a consolidated development.

The numbers cited above aptly summarize the tourism supply "model" of the different countries. Those with the most recently developed tourism, such as the Scandinavian countries, Portugal, Greece or Spain, have medium to large sized establishments which indicates the prevalence of hotel chains or large sized businesses.



Source: elaboration from Eurostat data

Vice versa, in countries with an older tourism tradition, the family run business seems to dominate; these are characterized by small size and contribute to lower the average size.

It is evident that in almost all countries the trend is toward an increase in the average size; this is necessary to obtain economies of scale and to permit more efficient management of the structures. All seventeen countries in fact have measured a positive change in the average size of the typical hotel structure, a change that was approximately 15.6% for the entire EU and 9.8% overall for EFTA. Within the EU, France again is in first place with an increase in the average number of beds per hotel of 27.7% followed by Belgium (+22%), by Germany (+15%) and by Portugal (+13%). In the EFTA countries, Finland, again, has had the greatest increase in the average number of beds per structure (+24.1%) followed by Austria (+17%), while the other countries are left far behind.

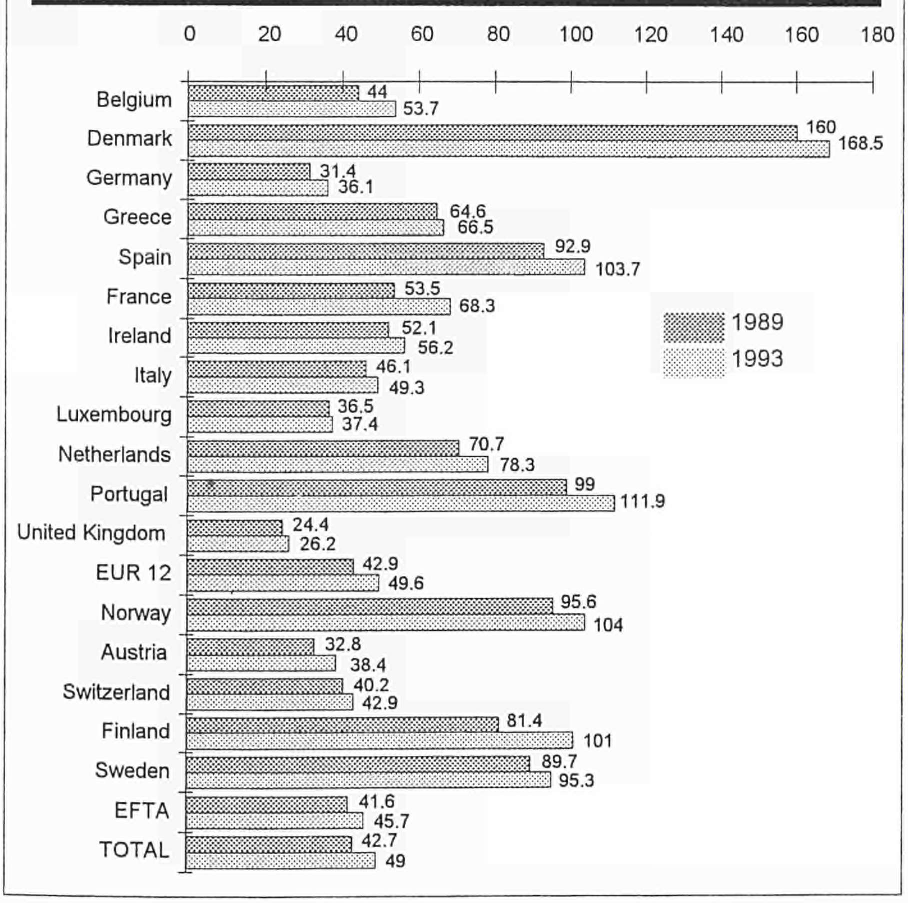
This phenomenon is common to all the countries of Europe and indicates an increase at the European level of the average size of receptive structures. The explanation depends on whether the result is due to a decrease in the number of receptive structures accompanied by an increase in the number of beds or to an increase both in the number of structures and in the number of beds, with the latter of a greater entity.

In the first case the phenomenon may be explained by the effect of an internal reorganization of the tourism supply which tends to expel from the system the small sized, marginal and not very profitable structures, a structural reorganization that has taken place above all in countries with consolidated tourism. This may be the case for example of Belgium, Germany, Spain, Italy and Switzerland. Austria and the United Kingdom are instead the only two countries in which a reduction in both establishments and in the number of beds has taken place. In the United Kingdom in particular the phenomenon is of large proportions and must be considered in light of the strong tendency underway to expel the minor players from the market (i.e. "bed and breakfast").

In the second instance the phenomenon described results from the overall development of supply in the tourism sector where newly constructed hotels and similar establishments are built on a larger scale with respect to those already existing. This is the case in Denmark (note: here, however, only hotels with more than 40 beds are surveyed), Greece, Ireland, the Netherlands, Portugal, Finland and Norway.

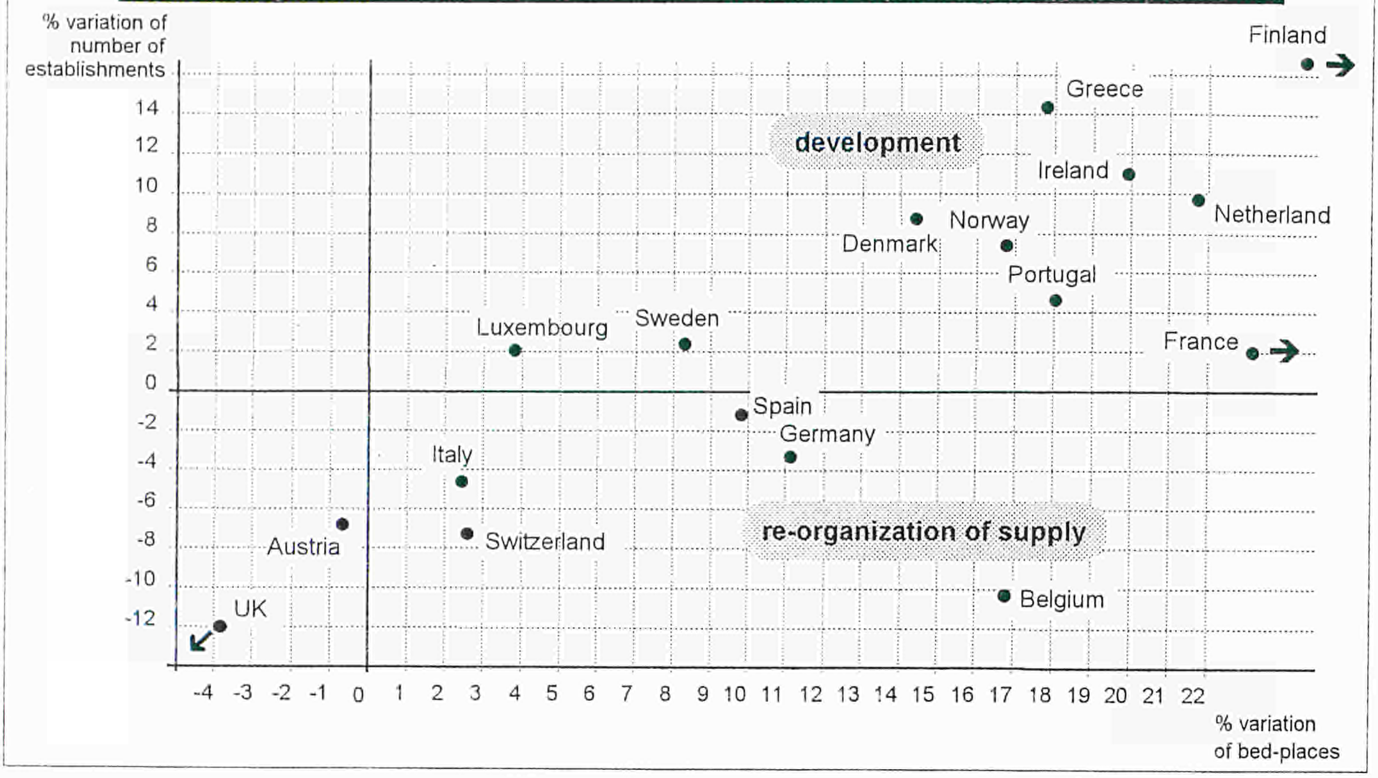
France is a case unto itself. Although tourism here is considered to be consolidated, France has demonstrated a trend that is, in part, similar to those countries where tourism is emerging. While there is a modest increase in the number of structures (+2%) growth

AVERAGE NUMBER OF BED-PLACES PER ESTABLISHMENT, 1989-1993



Source: elaboration from Eurostat data

VARIATION OF THE NUMBER OF HOTELS AND SIMILAR ESTABLISHMENTS (1993/89)



Source: elaboration from Eurostat data

is very significant with respect to the number of available beds (+30.4%), Indeed, the increase in the average number of beds per structure is 27.7%.

3.5 Camp-sites and tourist villages

In 1993 camp-sites and tourist villages amounted to approximately 17 750 units in eleven EU countries (excluding the United Kingdom for which the most recent information dates from 1988) and more than 3 000 in EFTA countries.

The country with the greatest number of establishments of this type is France, which in 1993, had approximately 53% of the total campsites and tourist villages in the EU, followed by Italy with 13.2% and Spain with 5.8% (given that reference is made to campsites only). With respect to 1989 the two countries that have developed this type of structures the most are Spain with an increase of 16.3% and Portugal with an increase of 12.5%. The other countries that have had a relatively important expansion in the presence of camp-sites and tourist villages in national territory are Denmark (+8.5%) and Greece (+5.7%). The only country in the EU that has shown a consistent retrenchment is Belgium (-14.9%).

In the EFTA area there are contrasting trends. Positive changes of a rather significant amount were registered in Finland (+8%) and Austria (+6.6%) and negative changes in the rest of the area (from -4.7% in Sweden to -2.9% in Norway).

As far as beds are concerned, these amounted to approximately 6.6 million in 1993 in the EU (excluding the United Kingdom) and to approximately 260,000 in Switzerland and Finland (the only two EFTA countries for which it has been possible to obtain data). The country with the greatest number of beds in campsites and tourist villages is again France which in 1993 holds 45.9% of all those available in the EU. Italy follows at a big distance with 19%. From the available data it seems that Denmark registered the most significant increase (+37%) in the receptive offering of the sector since 1989. This ratio must be taken with due caution since numbers on which it is based come from different sources; moreover the 1989 data is an estimate. With respect to 1989 Spain has increased the number ofbeds available in camp-sites by approximately 28% . Increases of a certain significance have taken place in France (+11.8%), in Luxembourg (+9.9%) and in Italy (+7.3%). As far as EFTA countries are concerned, the most relevant number when compared with 1989, is the decrease of 12% in the number of available beds in camp-sites and tourist villages in Switzerland.

Number of campings and tourist villages, 1989-1993

Country	1989	1993	% variation
Belgium	739	629	-14.9
Denmark	390	423	8.5
Germany	29	2 207	n.c. [7]
Greece	297	314	5.7
Spain [1]	893	1 039	16.3
France	9 287	9 390	1.1
Ireland	7 [2]	124	n.c. [7]
Italy	2 258	2 341 [3]	3.7
Luxembourg	127	123	-3.1
Netherlands	1 027	989	-3.7
Portugal	152	171	12.5
United Kingdom	4 231 [4]	n.a.	-
EUR 9 [6]	**15 170**	**15 419**	**1.6**
Norway	796	773	-2.9
Austria	497	530	6.6
Switzerland	643	613	-4.7
Finland	363	392 [5]	8
Sweden	756	725 [3]	-4.1
EFTA	3 055	3 033	-0.7
TOTAL	**18 225**	**18 452**	**1.2**

(1) Campings only
(2) Datum refers to 1987
(3) Data refer to 1992
(4) Datum refers to 1988.
(5) Not fully comparable with figures concerning previous years
(6) Excluding Germany, Ireland and the United Kingdom.
(7) The analysis of the available data suggests that it could have been a change in the criterion of data collection over the period analysed

Source: Eurostat

3.6 Other supplementary accommodation establishments

Other supplementary accommodation establishments include holiday dwellings, group tourism accommodations and specialized accommodations. Not all the countries making up the EU and EFTA gather data on these type of tourist facilities, or they gather only partial data that refers to one or two of the categories, or gather the data in different ways. As a consequence the available information is only partially comparable.

In 1993 other supplementary accommodation establishments amounted to approximately 208 000 units in the EU countries (excluding the United Kingdom for which the latest available data is from 1988) with an increase of 7.8% with respect to 1989. In the EFTA group (excluding Norway and Finland) such enterprises have reached almost 100 000 units and have remained substantially stable with respect to the previous four years.

The most relevant increases have taken place in Ireland (239%) where the units in 1987 were only 46, in Belgium (43.5%), in Spain (23.3%) and in Germany (20%). Italy had, instead, the highest decrease in per-cent terms with respect to 1989 at -30% and the Netherlands, too, experienced a somewhat significant decrease: 10%. In the EFTA area, where Switzerland alone represents 98.8% of the entire total of other supplementary accommodation establishments surveyed, the number of units maintained levels similar to those of 1989.

The number of beds in 1993 amounted to approximately 2 million in the EU (excluding the United Kingdom) with an increase of 10% with respect to 1989 and more than 740 000 in EFTA (excluding Norway and Finland) with an overall reduction of approximately 0.5%.

In the EU the most substantial increase in the receptive capacity took place in Ireland where the available beds have increased with respect to 1986 by 196%. Among the countries there are at least three that have registered considerable increases; Belgium with an increase of 35%, Spain with almost 25% and Greece with almost 16%. The rest of the EU maintains rather stable levels with the exception of Portugal with a reduction of 22% and France with a decrease of 11.2%.

Bed-places in campings and tourist villages, 1989 - 1993

Country	1989	1993	% variation
Belgium	378 383	364 969	3.5
Denmark	185 785	254 700	37
Germany	23 850	602 490	n.c. [3]
Greece	78 145	82 742 [1]	5.9
Spain	470 358	602 370	28
France	2 716 276	3 038 211	11.8
Ireland	534	6 738	n.c. [3]
Italy	1 180 603	1 266 969 [1]	7.3
Luxembourg	12 037	13 228	9.9
Netherlands	499 889	485 757	-2.8
Portugal	256 985	267 415	4
United Kingdom	n.a.	n.a.	-
EUR 9 [2]	**5 778 461**	**6 011 756**	**4**
Norway	n.a.	n.a.	-
Austria	n.a.	n.a.	-
Switzerland	270 000	237 600	-12
Finland	23 455	22 970	-2.1
Sweden	n.a.	n.a.	-
EFTA	-	-	-
TOTAL	-	-	-

(1) Data refer to 1992
(2) Excluding Germany, Ireland and the United Kingdom
(3) The analysis of the available data suggests that it could have been a change in the criterion of data collection over the period

Source: Eurostat

3.7 Restaurants, cafés, bars and travel agencies

Restaurants, cafes and bars are not set up to be used solely by tourists but serve at the same time both residents and travellers; their activities therefore do not belong entirely to the tourism sector but rather only partially, whenever they are used by a tourist or a traveller. Obviously their importance as tourist facilities is proportionately related to the amount of tourist business that occurs in the areas in which they are located.

Due to the lack of data for 1993, it is not possible to completely compare the situation with 1989. Nevertheless, some indication, even if partial in nature, of the direction of the structural trends of the last four years may be drawn from the available data.

Restaurants and restaurant-bars have increased in almost all the countries that have furnished data; considerable increases have been measured in Portugal (67.5%), Austria (53.3%), Finland (28%), the Netherlands (15%), and to a lesser degree, Luxembourg (6%), France (5.4%), Norway (3.9%), and Italy (2%). The only decrease in this area has taken place in Denmark (-34%).

The number of coffee-bars and public houses has registered a very large increase in Portugal (73%), a restrained increase in Norway (1.2%); an almost unvaried position in Italy, a slight drop in Luxembourg (-1.1%)

and in the Netherlands (2.8%) and a more marked reduction in France (7.5%).
The number of travel agencies, whose activities are strictly linked to outgoing tourism, has grown in all the countries for which data is available, except for Norway which has suffered a drop of 14.2%. The strongest increase has been registered by Austria (102.7%), followed by Portugal (21.4%), by Italy (20.8%), by France (14.2%), by The Netherlands (10.8%) and by Finland (4%).

Number of restaurants and bar restaurants, 1989-1993

Country	1989	1993	% variation
Belgium	16 922	n.a.	-
Denmark	13 266	8 753 [1]	-34
Germany	90 328	n.a.	-
Greece	19 948	n.a.	-
Spain	49 167	n.a.	-
France	71 223	75 091 [1]	5.4
Ireland	1 876 [2]	n.a.	-
Italy	90 049	91 831 [1]	2
Luxembourg	453	480 [3]	6
Netherlands	18 798	21 613 [1]	15
Portugal	3 016	4 751 [1]	57.5
United Kingdom	101 839	n.a.	-
EUR 12	-	-	-
Norway	4 341	4 511 [1]	3.9
Austria	18 715 [2]	28 505 [3]	53.5
Switzerland	6 058	n.a.	-
Finland	5 974 [4]	7 652 [1]	28
Sweden	12 165	n.a.	-
EFTA	-	-	-

(1) Data refer to 1992
(2) Data refer to 1988
(3) Data refer to 1991
(4) Datum refers to 1990

Source: Eurostat

Number of coffee-bars and public houses, 1989-1993

Country	1989	1993	% variation
Belgium	36 711	n.a.	-
Denmark	n.a.	4 791 [1]	-
Germany	n.a.	n.a.	-
Greece	n.a.	n.a.	-
Spain	11 228	n.a.	-
France	64 451	59 588 [1]	-7.5
Ireland	6 478 [2]	n.a.	-
Italy	140 469	140 401 [1]	-0.05
Luxembourg	1 410	1 394 [3]	-1.1
Netherlands	16 350	16 808 [1]	2.8
Portugal	5 263	9 129 [1]	7.3
UK	n.a.	n.a.	-
EUR 12	-	-	-
Norway	983	995 [1]	1.2
Austria	n.a.	n.a.	-
Switzerland	n.a.	n.a.	-
Finland	n.a.	n.a.	-
Sweden	n.a.	n.a.	-
EFTA	-	-	-

(1) Data refer to 1992
(2) Datum refers to 1988
(3) Datum refers to 1991

Source: Eurostat

Number of travel agencies, 1989-1993

Country	1989	1993	% variation
Belgium	873	n.a.	-
Denmark	461	n.a.	-
Germany	6 271	n.a.	-
Greece	3 038	n.a.	-
Spain	2 064	n.a.	-
France	2 250	2 569 [1]	14.2
Ireland	294 [2]	n.a.	-
Italy	4 500	5 436 [1]	20.8
Luxembourg	65	n.a.	-
Netherlands	2 200	2 438 [1]	10.8
Portugal	425	516	21.4
UK	6 937 [3]	n.a.	-
EUR 12	-	-	-
Norway	698 [4]	599 [1]	-14.2
Austria	780 [2]	1 595 [5]	102.7
Switzerland	409	n.a.	-
Finland	418 [4]	435 [1]	4
Sweden	862	n.a.	-
EFTA	-	-	-

(1) Data refer to 1992
(2) Data refer to 1988
(3) Datum refers to 1987
(4) Data refer to 1990
(5) Datum refers to 1991

Source: Eurostat

TOURISM IN EUROPE

Supply

eurostat

1. Tourism in general

Tourism is part of the massive phenomenon of personal mobility which has emerged during the second half of the 20th century and developed rapidly, especially in Europe, with the approach of the 21st century. Tourism is the aspect of that mobility which involves the temporary movement of people outside their usual environment for purposes of leisure and vacation, for professional reasons (business travel, assignments paid at the place of departure, attendance at meetings and conferences, study) or for other reasons (visiting friends and relatives, pilgrimages, health reasons, sporting events, etc.).

This kind of movement transfers, along with the individuals involved, part of their income from the areas where it is generated to those where it is used or spent. This explains the economic as well as the social significance of tourism as a catalyst for the redistribution of resources.

In order to accommodate the flows of national, Community and international tourists, the countries of the European Union (EU) and the European Free Trade Area (EFTA) provide a wide range of resources and facilities for the movement of people away from their usual place of residence.

These resources and facilities come under the name of "tourism-related services". The variety of such services within the Community is based on four definite assets:

- natural and environmental attractions;
- cultural heritage;
- service infrastructure;
- organisation of tourist facilities.

The first two of these assets are non-renewable and non-negotiable. The third asset comprises the public infrastructure which serves the local population but which is also used by visitors. The final asset includes economic activities which are specifically geared towards providing facilities, services and goods which are used primarily but not solely by tourists: in other words, the tourist industry.

All these assets are well represented throughout Europe.

The variety and splendour of the natural environment make it one of Europe's primary tourist resources. It provides a tremendous range of attractions: climate, natural phenomena, sea, mountains, forests, countryside, rivers, lakes, towns and villages, landscape, etc. They provide a constant backdrop to the daily life of both residents and visitors, and yet they are readily accessible. They are a great tourist attraction but this may bring in its wake a number of problems. Particular problems emerged in the early 1990s and affected not only local residents but also the quality of tourism in the European Community.

Europe's cultural heritage (history, art, folklore, civic and religious architecture, etc.) is renowned for its wealth and variety in every part of the Community.

Since the cultural heritage represents the main appeal of Europe to overseas tourists, the exploitation of the continent's cultural attractions for tourism purposes is highly developed. In certain circumstances and at certain peak times of tourist influx, this even threatens the very existence of the attractions which make up this heritage. The cultural heritage of the Community and EFTA countries may suffer from the problems of how it should be protected while still used for tourism.

In addition to the splendour of Europe's cultural attractions, they are also fairly well spread throughout the Community and EFTA countries. The various countries and regions are very different from each other, although none can be said to outshine the others.

Europe's third main asset is its general public infrastructure. During his visit, every traveller obviously has certain needs, many of which he has in common with local residents: transport, communications, shops, banks, postal services, telephones, medical and welfare services, information, entertainment, personal safety and security, etc. The sectors which operate in response to these needs and requirements offer services indiscriminately to residents and visitors, and there is often no way of determining the type of user. The proportion of the output of these sectors which is used by visitors depends on the place, the period and the particular situation.

This means that the whole range of tourist-related services can be defined only vaguely, since such services extend to cover many sectors of economic activity. It is therefore difficult to arrive at a comprehensive analysis (in quantitative terms) of the impact of tourism on the economy.

In comparison with other tourist areas of the world, public infrastructure in the Community and EFTA countries can be judged very favourably. Services for the benefit of individuals originated in the countries of the European Community and the standard is still high, even though other parts of the world are fast catching up or moving ahead.

However, the quality of tourist-related services varies greatly in the different countries of Europe. The fourth group of assets concerns specific tourism-related services. The structure of tourist facilities is the one which is most directly linked to demand in this sector and a large proportion of output is geared to satisfying this demand. Since these are commodities which can be traded on the market, it is this group of assets which is commonly referred to simply as the "supply side" of the tourism sector.

Tourism activities usually show a keen awareness of problems in this sector, whereas in the areas referred to earlier - in spite of their extreme importance for tourism - the focus on such problems is often reduced with the difficulty of determining the extent of actual tourist demand or use.

There are certain traditional branches which are covered by the sector of tourism-related activities. The sector is known as HORECA-AdV, an acronym which is formed from the initials of the French definition "Hôtellerie, Restauration, Cafeteria et Agences de Voyages".

The sector comprises :

- hotels and other accommodation facilities (camp sites, tourist villages, holiday homes, youth hostels, etc.) ;
- catering establishments for the dispensation of food and beverages: restaurants and similar food outlets, bars, cafés, etc. ;
- travel agencies: tour operators, travel retailers, etc.

The sector is sometimes extended to include other related activities such as dance halls, discotheques, casinos, swimming pools, etc.

2. Tourism supply

The European Union had, in 1991, at least 1 350 000 establishments in the sector of activities specifically geared to tourism. This huge number consisted of 354 000 suppliers of accommodation, 485 000 restaurants, more than 30 000 travel agencies and an unknown number - but equal at least to the number of restaurants - of cafés and bars.

There were also 123 000 suppliers of accommodation, 48 000 restaurants, 3 600 travel agencies and, again, an unknown but considerable number of cafés and bars in the EFTA countries. In total, therefore, the EU and EFTA countries have about 2 million establishments catering mainly for tourists and travellers.

With few exceptions, the various activities in the tourism sector are carried out by small (or even micro) and medium-sized enterprises. They differ from each other in type, size and the actual extent of their tourism-related activities.

2.1 Tourist accommodation

Suppliers of accommodation are those most closely involved in the provision of services to tourists and travellers. Accommodation covers various types of establishment which vary greatly according to the type of service provided.

TOURIST ACCOMMODATION - TOTAL (*) (**) 1A. Number of establishments			
COUNTRY	1989	1990	1991
Belgium	3.485	3.416	3.196
Denmark	1.022	1.032	1.048
Germany	*47.985*	*47.859*	*50.979*
Greece	6.868	7.045	7.337
Spain	*110.598*	*128.037*	*133.552*
France	29.329	29.586	30.204
Ireland	*928*	*905*	*940*
Italy	67.295	61.653	58.470
Luxembourg	535	539	537
Netherlands	*3.138*	*3.130*	*3.099*
Portugal	1.908	1.973	2.010
United Kingdom	*62.336*	*62.413*	*62.413*
EUR 12	*335.427*	*347.588*	*353.785*
Austria	22.921	22.294	22.199
Finland	*1.535*	*1.570*	*1.564*
Norway	*1.105*	*1.135*	*1.168*
Sweden	3.080	3.109	3.237
Switzerland	100.803	100.611	100.410
EFTA	*129.444*	*128.719*	*128.578*
Total EU/EFTA	*464.871*	*476.307*	*482.363*

(*) The data in italics is partial, provisional or derived from other data in italics.
(**) cp. also notes only on tables 2A, 3A, 4A

Source: Eurostat

TOURIST ACCOMMODATION - TOTAL (*) (**) 1B. Number of bed-places			
COUNTRY	1989	1990	1991
Belgium	570.196	563.663	530.692
Denmark	*287.460*	*290.226*	*290.851*
Germany	*1.801.035*	*1.816.103*	*2.043.086*
Greece	510.676	525.180	550.145
Spain	*1.724.810*	*1.885.715*	*1.950.881*
France	*3.755.013*	*3.777.191*	*4.025.988*
Ireland	*48.103*	*48.183*	*51.326*
Italy	3.190.140	3.178.065	3.256.177
Luxembourg	*28.208*	*28.254*	*29.261*
Netherlands	*782.407*	*778.957*	*785.000*
Portugal	437.376	450.981	464.859
United Kingdom	*2.717.872*	*2.744.564*	*2.744.564*
EUR 12	*15.853.296*	*16.087.082*	*16.722.830*
Austria (1)	*747.138*	*740.620*	*744.414*
Finland (2)	*92.100*	*97.400*	*97.400*
Norway (2)	*105.286*	*112.660*	*116.926*
Sweden (1)	*215.408*	*218.660*	*225.342*
Switzerland	*1.143.739*	*1.139.720*	*1.133.909*
EFTA (3)	*2.902.877*	*2.928.856*	*2.941.851*
Total EU/EFTA	*18.756.173*	*19.015.938*	*19.664.681*

(*) The data in italics is partial, provisional or derived from other data in italics
(**) cp. also tables 1C, 2B, 3B
1) Camping and tourist villages not included
2) Camping and tourist villages and other supplementary accommodation establishments not included
3) Including estimations on camping and tourist villages in the EFTA countries

Source: Eurostat

HOTELS AND SIMILAR ESTABLISHMENTS(*) 2A. Number of establishments			
COUNTRY	1989	1990	1991
Belgium	2.148	2.123	1.957
Denmark	531	539	545
Germany	37.873	37.423	38.393
Greece	6.555	6.713	6.991
Spain	9.883	9.436	9.603
France (2)	*20.162*	*20.419*	*20.728*
Ireland	865	842	877
Italy	37.162	36.423	35.792
Luxembourg	399	400	398
Netherlands	1.544	1.546	1.531
Portugal	1.701	1.758	1.785
United Kingdom	39.714	39.769	(1) 39.769
EUR 12	*158.537*	*157.391*	*158.369*
Austria	19.992	19.406	19.257
Finland	1.172	1.216	*(2) 1.216*
Norway	1.105	1.135	1.168
Sweden	1.712	1.710	1.828
Switzerland	6.903	6.735	6.749
EFTA	30.884	30.202	*30.218*
Total EU/EFTA	*189.421*	*187.593*	*188.587*

(*) The data in italics is partial, provisional or derived from other data in italics
1) Data for 1990
2) Including only data for classified hotels.

Source: Eurostat

HOTELS AND SIMILAR ESTABLISHMENTS(*) 2B. Number of bed-places			
COUNTRY	1989	1990	1991
Belgium	92.543	93.710	86.472
Denmark	85.014	88.468	92.524
Germany	1.191.000	1.200.181	1.311.318
Greece	423.790	438.355	459.297
Spain	918.649	929.533	972.808
France (2)	*1.082.138*	*1.104.316*	*1.134.902*
Ireland	45.097	45.177	48.320
Italy	1.670.451	1.678.910	1.708.033
Luxembourg (3)	*14.810*	*14.782*	*15.094*
Netherlands	109.195	111.329	112.583
Portugal	168.437	179.337	188.501
United Kingdom	971.021	993.454	*(1) 993.454*
EUR 12	*6.772.145*	*6.877.552*	*7.123.306*
Austria	656.936	650.559	654.127
Finland	92.100	97.400	*(1) 97.400*
Norway	105.286	112.660	116.926
Sweden	153.642	158.372	165.662
Switzerland	277.519	276.150	274.019
EFTA	1.285.483	1.295.141	*1.308.134*
Total EU/EFTA	*8.057.628*	*8.172.693*	*8.431.440*

(*) The data in italics is partial, provisional or derived from other data in italics
1) Data for 1990
2) Including data only for classified hotels.
3) Estimation on the basis of an average of 1.84 beds per room, calculated on the basis of countries presenting a full set of data.

Source: Eurostat

2.1.1 Hotels and similar establishments

Hotels and similar establishments are collective accommodation establishments typified by being arranged in rooms, in numbers exceeding a specific minimum, and by providing common services including room service.

There were more than 158 000 hotels and other establishments which fitted this description in the Community in 1991, offering a total of 7 123 000 beds. The data does not include hotels in France which have not been given national approval, and it must be assumed that the final figure is an under-estimation.

There has been no increase in the number of hotels and similar establishments in recent years; indeed, the number has gone down. Between 1989 and 1991 the figure fell by 168. The main reason for this drop is the elimination of tiny marginal establishments. The result is that the total capacity of hotels and similar establishments is steadily moving up. The number of rooms increased by 4.5% in the 1989-91 period, while the number of available beds went up by 5.2%. The average size of hotels and similar establishments went up from 43 to 45 beds in the same period.

In addition to increasing capacity, establishments in the hotel trade have also improved the services they offer. Particularly in recent years, hotels in Europe have upgraded not only their

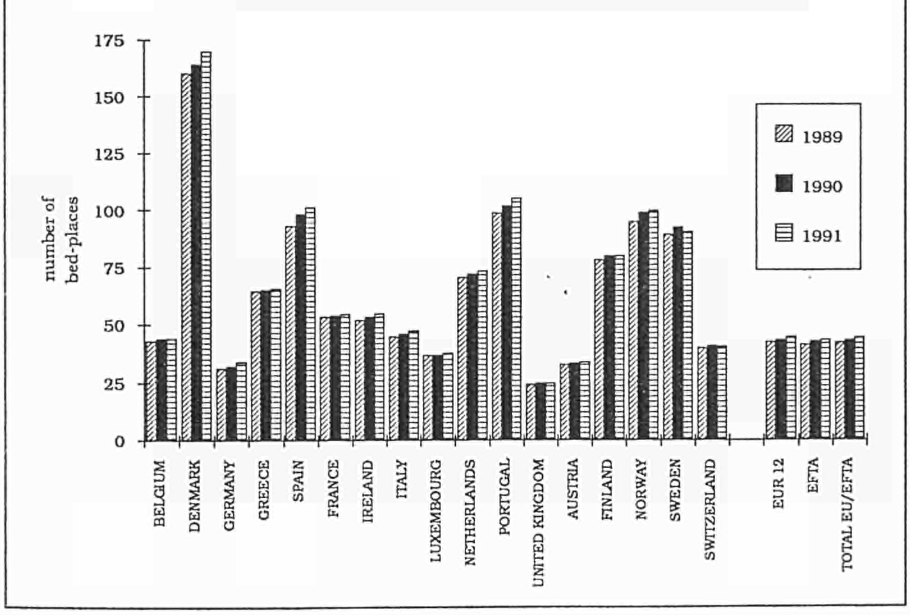
HOTELS AND SIMILAR ESTABLISHMENTS(*)
2C. Number of bedrooms

COUNTRY	1989	1990	1991
Belgium	...	...	...
Denmark	24.092	35.607	37.056
Germany	...	...	...
Greece	224.478	232.764	243.950
Spain	491.056	497.788	521.564
France (1)	*541.069*	*552.353*	*567.451*
Ireland	22.801	22.815	24.117
Italy	922.084	926.106	939.181
Luxembourg	7.910	7.895	8.062
Netherlands	...	...	...
Portugal	75.105	79.411	82.575
United Kingdom	...	...	...
EUR 12	...	...	...
Austria	...	...	...
Finland	...	...	...
Norway	...	...	...
Sweden*	...	...	...
Switzerland	...	...	...
EFTA	...	...	...
Total EU/EFTA	...	...	...

(*) The data in italics is partial, provisional or derived from other data in italics. The symbol "..." indicates the non-availability of data.
1) Including only data for classified hotels.

Source: Eurostat

HOTELS AND SIMILAR ESTABLISHMENTS
Average number of bed-places per establishment



Source: Eurostat, calculations

rooms but also general non-accommodation facilities (conference and meeting rooms, restaurants and bars, etc.) and other guest services (domestic and international communications, etc.).

It is now more common for hotels to offer a wide range of services in addition to the simple provision of accommodation.

When it comes to the distribution of hotels and similar establishments throughout the Union, the figures naturally indicate that capacity in terms of the number of beds is greatest in the larger Member States. In relative terms, however, in relation to population and to the Union average of 49 establishments and 2 193 beds per 100 000 inhabitants, the countries which are at the top of the Union list are Greece (70 establishments and 4 587 beds) and Luxembourg (108 establishments and 4 036 beds), followed by Italy (2 970 beds), Spain (2 490) and Germany (2 143). France, with 2 031 hotel beds per 100 000 inhabitants, is penalised by the lack of data on non-approved establishments.

The average size of hotels and similar establishments also varies considerably within the Community. Small, traditional establishments offering a more individual service are common, especially in the United Kingdom, with an average of 25 beds per establishment, Germany (34) and Luxembourg (38). Hotels of a larger average size are found in Denmark (170 beds per establishment), Portugal (106) and Spain (101), where the recent boom in package tourism has led to the construction of large hotels.In 1991 there were also 30 000 hotels and similar establishments in the EFTA countries. Here, too, there has been no increase in the number of establishments, with a slight reduction in number until 1990, but the number of hotel beds increased by 2.5% between 1989 and 1991.

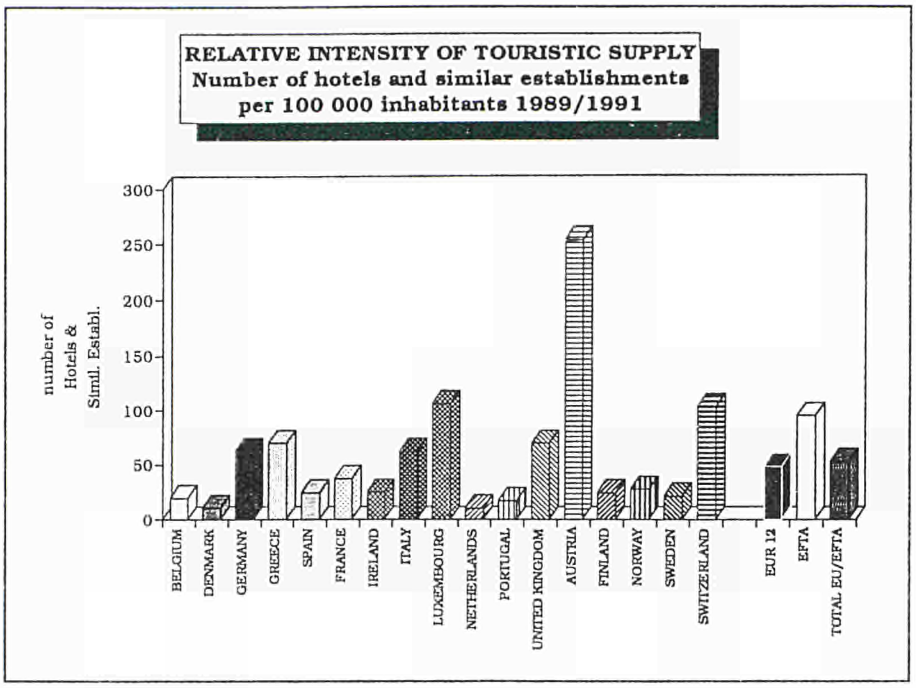
The EFTA country with most hotels is Austria, which had more than 19 000 in 1991. For the most part they are small establishments - and indeed among the countries considered Austria has the smallest establishments on average - providing a total of 654 000 beds. On the other hand, capacity is the highest in Europe, with 8 613 beds per 100 000 inhabitants.

Capacity in Norway, Finland and Sweden is more in line with the Community average, although the average size of establishments is larger (100, 80 and 91 beds per establishment in the three countries respectively). Hotels in Switzerland are roughly the same size as those in the Community (with an average of 45 beds per establishment), but they are so numerous that the country has 4 107 beds per 100 000 inhabitants.

In total, therefore, there were almost 189 000 establishments with 8 430 000 beds in the countries considered.

The sector usually consists of small undertakings, but the recent development of chain hotels (especially in the United Kingdom, France and Spain) indicates a definite trend towards amalgamation and consolidation.

Amalgamation takes the form of large hotel groups. At the beginning of the 1990s ten large companies owned approximately 2% of approved hotels with 8% of the beds in the Community.



Estimation: Belgium, France, Finland

Source: Eurostat, calculations

The importance of these companies is a result both of the economies of scale they achieve and, to a greater extent, of their ability to operate with sophisticated market-oriented systems.

With the aim of developing this aspect and providing a better market response and greater economies of scale, the early 1990s also saw the emergence of associations of small hotel groups, consortia and franchising arrangements.

In 1991 approximately 7% of hotels, with 13% of accommodation capacity, belonged to such groups in order to improve market awareness.

2.1.2 Camp sites and tourist villages

Camp sites and tourist villages are establishments (including collective facilities within specific boundaries for tents, caravans and chalets) which provide a minimum level of services (not necessarily room service). The accommodation unit is not a room but an area of land equipped with facilities.

They have developed an essential role in the tourist industry in the Community, given that their total capacity is very close to the number of beds available in hotels and similar establishments. Compared with 7 123 000 hotel beds in 1991, there were 7 130 000 places in 18 898 camp sites.

CAMPING AND TOURIST VILLAGES(*)
3A. Number of establishments

COUNTRY	1989	1990	1991
Belgium	739	725	701
Denmark	390	392	398
Germany	29	28	105
Greece	297	316	330
Spain	893	928	954
France (3)	*8.218*	*8.218*	*8.527*
Ireland (2)	*7*	*7*	*7*
Italy	2.210	2.058	2.299
Luxembourg	124	127	127
Netherlands	1.027	1.035	1.051
Portugal	152	157	168
United Kingdom (1)	*4.231*	*4.231*	*4.231*
EUR 12	*18.317*	*18.222*	*18.898*
Austria	497	489	493
Finland	363	354	348
Norway	...	...	...
Sweden	756	797	806
Switzerland	643	635	625
EFTA (4)	*2.259*	*2.275*	*2.272*
Total EU/EFTA (4)	*20.576*	*20.497*	*21.170*

(*) The data in italics is partial, provisional or derived from other data in italics.
The symbol "..." indicates the non-availability of data.
1) Data for 1988
2) Data for 1987
3) Estimation on the basis of the average rate of bed-places in the Netherlands, Germany, Belgium and Luxembourg
4) not including Norway

Source: Eurostat

CAMPING AND TOURIST VILLAGES(*)
3B. Number of bed-places

COUNTRY	1989	1990	1991
Belgium	378.383	373.237	351.684
Denmark (3)	*185.785*	*184.680*	*180.402*
Germany	23.850	23.072	34.997
Greece	78.145	78.084	82.107
Spain	470.358	571.278	575.349
France (3)	*2.451.651*	*2.451.651*	*2.669.862*
Ireland (2)	*534*	*534*	*534*
Italy	1.172.769	1.180.603	1.227.025
Luxembourg	12.037	12.111	12.806
Netherlands	499.889	493.780	499.804
Portugal	256.985	261.085	265.555
United Kingdom (1)	*1.229.904*	*1.229.904*	*1.229.904*
EUR 12	*6.760.290*	*6.860.019*	*7.130.029*
Austria	...	...	...
Finland	...	...	...
Norway	...	...	...
Sweden	...	...	...
Switzerland	270.000	266.500	265.000
EFTA (4)	*869.206*	*886.296*	*888.860*
Total EU/EFTA	*7.629.496*	*7.746.315*	*8.018.889*

(*) The data in italics is partial, provisional or derived from other data in italics.
The symbol "..." indicates the non-availability of data.
1) Data for 1988
2) Data for 1987
3) Estimation on the basis of the average rate of bed-places for the Netherlands, Germany, Belgium and Luxembourg
4) Estimation on the basis of the average rate of bed-places for camping and tourist villages in the total EUR 12 and Switzerland

Source: Eurostat

Their distribution throughout the Community again shows that all large countries, apart from Germany, have the highest number of camp sites and the greatest capacity.

In relation to the Union average of 2 150 places per 100 000 inhabitants, however, the countries which have the greatest capacity are France (4 778 places), Belgium (3 543), Denmark (3 517), Luxembourg (3 424) and the Netherlands (3 387).

The three Mediterranean countries of the Community - Italy, Spain and Greece, where the climate ought to encourage the development of open-air tourism - are below the Community average with 2 134, 1 473 and 820 places, respectively.

Camp site capacity is even higher in Switzerland, with a total of 266 000 places or an average of 4 017 per 100 000 inhabitants. In the other EFTA countries, overall capacity is estimated at 631 000 places, giving an average of 2 475 places per 100 000 inhabitants.

There are more than 21 000 camp sites, with more than 8 million places, in the Community and the EFTA countries. They more than equal the capacity offered by hotels and similar establishments but their share of the market is strictly seasonal.

2.1.3 Other supplementary accommodation establishments

Other supplementary accommodation belonging to the category of collective accommodation establishments may be non-profit-making.

In the Community, this type of accommodation adds another 177 000 establishments with a total capacity of 2 470 000 places. These establishments are usually very small (14 places on average) and can be found mainly in Germany, the United Kingdom, Spain and the Netherlands. However, the data for these countries also includes privately rented holiday accommodation.

The available data seems to indicate that capacity is much smaller in the EFTA countries. In Austria and Sweden together about 3 000 establishments provide nearly 150 000 places. In Switzerland, on the other hand, the extent of this type of accommodation is much greater, with 93 000 establishments offering 595 000 places, but this is accounted for by the fact that the data from Switzerland includes privately rented accommodation not included in any organised framework.

There are in total, therefore, almost 273 000 other supplementary accommodation establishments offering 3 214 000 places in the countries considered.

2.1.4 Total accommodation capacity

In 1991 there were approximately 354 000 accommodation establishments in the European Community (5.5% more than in 1989), with a capacity of about 16 723 000 places (5 139 per 100 000 inhabitants). The countries which boasted the highest average capacity were Luxembourg (7 823 per 100 000) and France (7 205), and these two were followed by Denmark (5 669), Italy (5 667), Greece (5 494), Belgium (5 347), the Netherlands (5 319), and so on down to Ireland with 1 450 places per 100 000 inhabitants.

Capacity in the EFTA countries (not including Switzerland) added 1 808 000 places, and another 1 134 000 in Switzerland brought the total capacity of the EU and EFTA countries to almost 20 million places.

OTHER SYPPLEMENTARY ACCOMMODATION ESTABLISHMENTS (*)
4A. Number of establishments

COUNTRY	1989	1990	1991
Belgium	598	568	538
Denmark	101	101	105
Germany (1)	*10.083*	*10.408*	*12.481*
Greece	16	16	16
Spain (1)	*99.822*	*117.673*	*122.995*
France	949	949	949
Ireland (4)	*56*	*56*	*56*
Italy	27.923	23.172	20.379
Luxembourg	12	12	12
Netherlands (1)	*567*	*549*	*517*
Portugal	55	58	57
United Kingdom (1)	*(2) 18.391*	*18.413*	*(3) 18.413*
EUR 12	*158.573*	*171.975*	*176.518*
Austria	2.432	2.399	2.449
Finland	...	...	...
Norway	...	...	...
Sweden	612	602	603
Switzerland (1)	93.265	93.236	93.204
EFTA (5)	*96.309*	*96.237*	*96.256*
Total EU/EFTA (5)	*254.882*	*268.212*	*272.774*

(*) The data in italics is partial, provisional or derived from other data in italics.
The symbol "..." indicates the non-availability of data.
1) Including holiday dwellings which are not included in the statistics of other countries
2) Data for 1988
3) Data for 1990
4) Data for 1986
5) not including Finland and Norway

Source: Eurostat

OTHER SUPPLEMENTARY ACCOMMODATION ESTABLISHMENTS (*)
4B. Number of bed-places

COUNTRY	1989	1990	1991
Belgium	99.270	96.716	92.536
Denmark (5)	*16.661*	*17.078*	*17.925*
Germany (1)	*586.185*	*592.850*	*696.771*
Greece	8.741	8.741	8.741
Spain (1)	*335.803*	*384.904*	*402.724*
France (4)	*221.224*	*221.224*	*221.224*
Ireland (4)	*2.472*	*2.472*	*2.472*
Italy	346.920	318.552	321.119
Luxembourg	1.361	1.361	1.361
Netherlands (1)	*173.323*	*173.848*	*172.613*
Portugal	11.954	10.559	10.803
United Kingdom	*(2) 516.947*	*521.206*	*(3) 521.206*
EUR 12	*2.320.861*	*2.349.511*	*2.469.495*
Austria	90.202	90.061	90.287
Finland	...	...	...
Norway	...	...	...
Sweden	61.766	60.288	59.680
Switzerland (1)	*596.220*	*597.070*	*594.890*
EFTA (6)	*748.188*	*747.419*	*744.857*
Total EU/EFTA (6)	*3.069.049*	*3.096.930*	*3.214.352*

(*) The data in italics is partial, provisional or derived from other data in italics.
The symbol "..." indicates the non-availability of data.
1) Including holiday dwellings which are not included in the statistics of other countries
2) Data for 1988
3) Data for 1990
4) Data for 1986
5) Estimation on the basis of the average rate of bed-places for accommodation establishments in Belgium and Luxembourg
6) not including Finland and Norway

Source: Eurostat

2.2 Restaurants and similar establishments

Supply in this particular sector has become very varied. Alongside traditional restaurants offering a perfect blend of ambience, food and service, many other kinds of catering establishment have emerged in recent years: fast food outlets, pizza parlours, self-service restaurants, snack bars, sandwich bars, pubs and bistros, etc. Thanks to such establishments, eating out has become a widespread and less expensive habit than in the past.

The catering trade in the Community depends on many small establishments, often family-run, which play an essential role with the specific service they provide. Within the area of observation there were 533 000 catering establishments in 1991, comprising 485 000 in the Community, 48 000 in the EFTA countries. There has been a decrease in the number of traditional, independently-owned establishments and a boom in the number of well-known chain restaurants, especially in the United Kingdom, Germany and France.

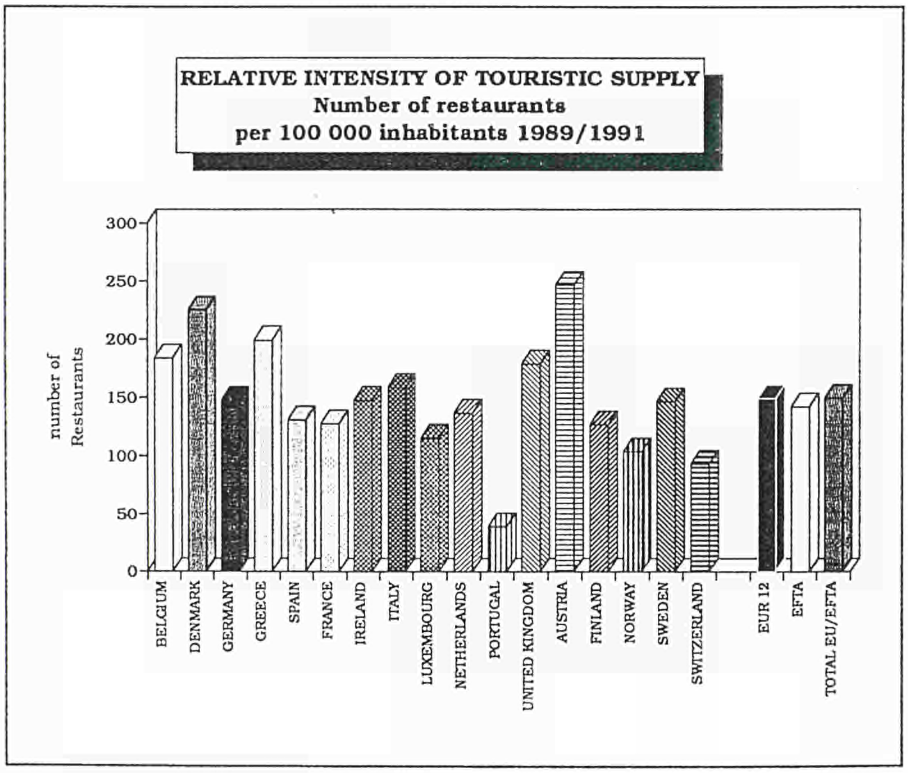
The structure of this sector varies from country to country. The largest number of restaurants can be found in the United Kingdom (102 000), Italy (91 000) and Germany (90 000). But in relation to population, Austria has the most with 246 restaurants and similar establishments per 100 000 inhabitants, followed by Denmark (225), Greece (199) and Belgium (184).

RESTAURANTS AND SIMILAR ESTABLISHMENTS (*)
5. Number

COUNTRY	1989	1990	1991
Belgium	16.922	17.656	18.231
Denmark	13.266	12.809	11.555
Germany	(3) 90.328	90.326	(3) 90.326
Greece	*(3) 19.948*	19.948	*(3) 19.948*
Spain	49.167	54.047	51.154
France	71.233	(4) 71.223	(4) 71.223
Ireland	*5.216*	*5.216*	*5.216*
Italy	88.713	90.049	91.102
Luxembourg	459	463	430
Netherlands	18.798	19.154	20.120
Portugal	3.016	3.504	4.078
United Kingdom	*101.839*	*101.893*	*101.893*
EUR 12	*478.903*	*486.288*	*485.276*
Austria	*18.715*	*(5) 18.715*	*(5) 18.715*
Finland	6.022	6.287	*(3) 6.287*
Norway	4.341	4.370	4.370
Sweden	12.165	12.840	12.363
Switzerland	6.058	*(4) 6.058*	*(4) 6.058*
EFTA	*47.301*	*48.270*	*47.793*
Total EU/EFTA	*526.204*	*534.558*	*533.069*

(*) The data in italics is partial, provisional or derived from other data in italics.
1) Data for 1985
2) Estimations on the basis of 1 474 per 1 000 inhabitants (average of the 11 remaining EC countries.
3) Data for 1990
4) Data for 1989
5) Data for 1988, including coffee bars and public houses

Source: Eurostat



Estimation: Belgium, Germany, Greece, France, Ireland, Austria, Finland, Norway, Switzerland

Source: Eurostat, calculations

CAFES AND BARS 6. Number			
COUNTRY	1989	1990	1991
Belgium	36.711	35.995	35.273
Denmark	...	...	...
Germany	...	88.589	...
Greece	...	...	...
Spain	11.228	6.147	7.566
France	64.451	...	...
Ireland	...	...	...
Italy	137.863	140.469	142.611
Luxembourg	1.354	1.341	1.171
Netherlands	16.350	16.100	16.355
Portugal	5.263	43.706	...
United Kingdom	...	...	...
EUR 12	...	...	...
Austria	...	...	...
Finland	...	...	...
Norway	...	...	...
Sweden	...	...	...
Switzerland	...	...	...
EFTA	...	...	...
Total EU/EFTA	...	...	...

Source: Eurostat

2.3 Cafés and bars

Even more than restaurants and other catering establishments, cafés and bars serve both residents and visitors, without any precise distinction possible between the two user categories.

In this sector, too, the range of services on offer in the European Union and the Efta countries has multiplied in recent years, with new types of establishment emerging to take their place alongside the more traditional places catering to local and tourist needs. A feature of this sector nowadays is the variety of establishments from country to country and within countries.

What they have in common is that they are places where people can meet while having a drink, or drink while meeting people.

Alongside the traditional cafés and bars, there are now pubs, discos, clubs, ice cream parlours and other types of meeting place. The existence of these establishments helps to increase tourist activities in many places. Sometimes they are the prime attraction for tourists to certain places, and they represent a key element in a general restructuring of tourist facilities.

In this sector, to an even greater extent than in those reviewed earlier, establishments are often small and family-run. There is a vast number of establishments, but the actual number is often not known. In the twelve Member States, for example, only seven provide data - which is often rudimentary - on the basis of surveys.

TRAVEL AGENCIES (*) 7. Number			
COUNTRY	1989	1990	1991
Belgium	873	934	987
Denmark (2)	*461*	*461*	*461*
Germany	*(3) 6.271*	6.271	*(3) 6.271*
Greece	*(3) 3.038*	3.038	*(3) 3.038*
Spain	2.064	2.196	2.190
France	2.250	*(4) 2.250*	*(4) 2.250*
Ireland (2)	*318*	*318*	*318*
Italy	4.500	4.825	5.163
Luxembourg	65	64	64
Netherlands	2.002	2.069	2.307
Portugal	425	456	456
United Kingdom (1)	*6.937*	*6.937*	*6.937*
EUR 12	*29.204*	*29.819*	*30.442*
Austria	*(5) 780*	*(5) 780*	*(5) 780*
Finland	407	418	*(3) 418*
Norway	698	*(4) 698*	*(4) 698*
Sweden	862	953	1.282
Switzerland	409	*(4) 409*	*(4) 409*
EFTA	*3.156*	*3.258*	*3.587*
Total EU/EFTA	*32.360*	*33.077*	*34.029*

(*) The data in italics is partial, provisional or derived from other data in italics.
1) Data for 1987
2) Estimations on the basis of 0.089 Travel Agencies per 10 000 inhabitants (average of the 10 remaining EC countries)
3) Data for 1990
4) Data for 1989
5) Data for 1988

Source: Eurostat

The other five Member States are unable to indicate how many establishments there are in this sector. The structural organisation of the sector depends on geographic location and the social habits of the local population. The vast majority of establishments in this sector are very small undertakings, apart from a few larger companies.

2.4 Travel agencies

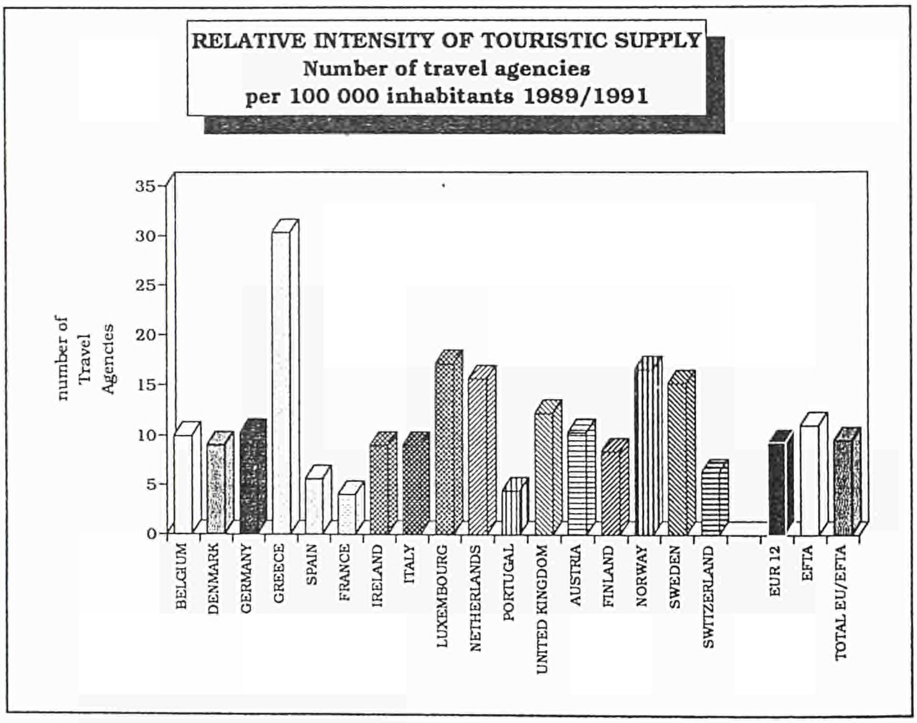
Together with the increase in incoming and outgoing tourism in Europe, the organisational role of travel agencies has increased in importance. The result has been an increase in the number of agencies with a better organisational structure and technological base.

The European Union has at least 30 442 travel agencies. The figure is qualified by "at least" because in some countries - such as the United Kingdom, Ireland, Denmark, Germany and France - the data is not up-to-date. The EFTA countries have 3 587 travel agencies. Among the 34 000 or so travel agencies operating in the 17 countries considered, the most common type is the small independent agency involved mainly in the retailing of travel services. There is also a limited number of larger companies - operating mainly in the northern Member States of the Community - involved in arranging tour and holiday packages. These are the tour operators who offer their services directly to the public or via the small retail agencies. The major companies are now tending to expand both vertically and horizontally in the provision of tourism-related services, with investment in airlines, hotels and transport services.

The distribution of travel agencies is heavily biased towards the United Kingdom (6 937) and Germany (6 271), where there is a heavy demand for outgoing travel. These two countries are followed by Italy, with 5 163 agencies in 1991, which at the end of the 1980s became an important country for outgoing tourism-related services. This led to a boom in the number of agencies offering such services. Greece also has a large number of very small agencies (more than 3 000), although they deal mainly with incoming tourism. Greece, in fact, has the highest number of agencies in relation to population, with 30 per 100 000 inhabitants, followed by 17 in Luxembourg, nearly 16 in the Netherlands, more than 12 in the United Kingdom and 10 in Germany.

2.5 Other tourism related activities

The tourism sector is not limited to the activities so far described. There are many others which ought to be mentioned, the chief examples being self-drive car hire, ports and marinas, spas and ski resorts. There are also museums and cultural attractions, conference centres, tourist information offices, and so on. Unfortunately, a lack of statistical information in these areas means that a standard picture of the situation in the 17 countries can not be drawn.



Estimations: Belgium, Denmark, Germany, Greece, France, Ireland, Austria, Finland, Norway, Switzerland

Source: Eurostat, calculations

TOURISM IN EUROPE

Demand

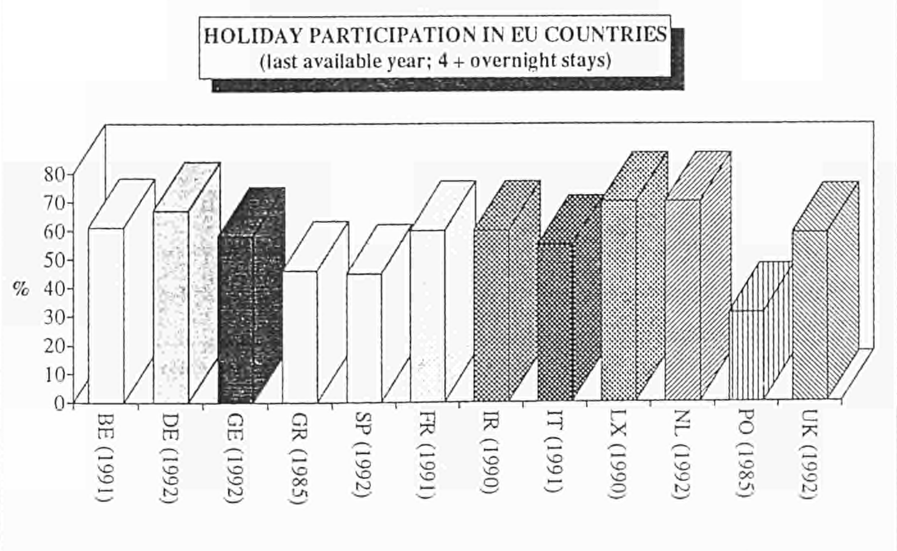
eurostat

1. Introduction

This chapter deals with the holiday patterns of the population of the European Union in terms of holiday participation, the number of holidays taken and global destination flows. In addition the development of various core aspects of holiday behaviour like the use of accommodation, means of transport, seasonality and expenditure are presented. The main focus is on holidays lasting four nights and more (4+ holidays).
In most of the EU-countries surveys are carried out collecting data in respondents' homes. Holiday surveys are related to domestic and outbound tourism generated by the population of the respective country. Comparability between surveys leaves, however, much to be desired, concerning e.g. differences in the sample population and available time series.

Due to the lack of available data, chapter 2 does not present detailed information on the EFTA countries. In chapter 3 attention concentrates on inbound tourism for the EU-EFTA region using existing information on nights spent by non-residents in registered accommodation. Inbound tourism concerns the inflow of visitors to a certain country originating from other EU-EFTA countries or outside the EU-EFTA region.
Accommodation statistics provide a more precise picture than holiday surveys of tourism development in certain regions below the national level.
Moreover, most private accommodation used by tourists is not taken into consideration, thus underestimating the real volume and impact of tourism.

The last chapter will summarise some of the main factors having an impact on tourist flows in the near future.



Source: National holiday surveys

2. Holiday patterns of the EU population

2.1 The global picture

The total number of 4+ holidays yearly undertaken by EU residents is estimated between 250-300 million in 1991/1992. Holiday participation, defined as the proportion of the population that takes at least one vacation of at least 4 overnight stays on a yearly base, amounts to 55 to 60%.

There are marked differences between holiday participation, the volume of holidays and the ratio between domestic and outbound holiday trips.

In France and the northern EU countries holiday participation is above 60%, while levels for the Mediterranean countries are significantly lower.

Only in the Netherlands and France is the number of holidays per capita on an annual basis higher than 1; the lowest scores are found in Portugal (0.3) and Greece (0.45). The remaining EU countries rank between 0.8 and 1.

More pronounced are the differences comparing the number of holidays abroad per capita, with relative low ratios for the UK (0.38) and Ireland (0.48) in the Northern part of the EU, France on the level of 0.21 and the Mediterranean countries far below the EU average.

FINAL CONSUMPTION, TOTAL NUMBER OF HOLIDAYS AND HOLIDAYS ABROAD PER CAPITA, 1991

COUNTRY	Final consumption 1)	Total number of holidays 2)	Number of holidays abroad
Northern EU :			
Belgium	106	0.83	0.56
Denmark	119	0.90	0.65
Germany	124	0.94	0.68
Ireland	55	0.85	0.48
Luxembourg	119	...	...
Netherlands	97	1.16	0.67
United Kingdom	99	0.97	0.38
France	114	1.11	0.21
Southern EU :			
Greece	43	0.45	0.03
Spain	71	0.85	0.12
Italy	103	0.96	0.17
Portugal	25	0.30	0.03
TOTAL EU	100	0.94	0.34

1) Total EU=100, 1989
2) Including holiday participation and holiday frequency on an annual base

Source: Eurostat, estimations

The latter figures are particularly influenced by the level and distribution of national income.

Generally speaking, there is a link between the number of holidays abroad per capita and final consumption per capita. The position of Ireland with a relative high score on outbound tourism and the UK with a relative low score is somewhat surprising.
The low per capita figure on holidays abroad for France, being the most extensive and diversified holiday destination in Europe, is understandable.

The low score for Italy (in relation to final consumption) can be explained by the unequal distribution of income reflecting the difference in economic performance between the Northern and Southern parts, and the fact that Italy itself is offering a wide scope of attractive holiday destinations.

The amount of domestic tourism exceeds outbound tourism considerably. About 2/3 of all holidays generated by the EU population can be classified as "domestic tourism"; 22% is international tourism within the EU region and 13% of all holidays are spent in destinations outside the EU.

As far as cross-national tourism among EU countries is concerned, north-south flows have dominated since the start of mass tourism in Europe.

About 70% of tourism with its origin and destination within the EU can be classified as "north-south", i.e. directed to holiday destinations in France and the mediterranean countries.

2.2 Main generating countries

In the following we present some core aspects of "holiday making" for the period 1985-1991/1992 (depending on the availability of data for recent years). It should be noted, that Germany and the United Kingdom, together generate 50% of all outbound tourism in the EU.

Germany

Holiday participation of the former west-German population increased from 57% to 66% in the period 1985-1991. The number of holidays augmented from 36 to 46 million, indicating a growing holiday-frequency[1].

In 1992, a stabilisation in the volume generated by the German population was noted.
Almost 70% of holidays taken by the west-German population are oriented towards destinations outside Germany; this number remained stable in the period 1987-1991[2].

The main destinations are Spain, Italy and Austria, accounting for more than 50% of outbound tourism. Austria is loosing its grip on the German market, illustrated by a diminishing number of nights spent there and a decreasing market shares.

1) Taking into account the former east-Germany, 58 million of 4 + holidays are registered in 1992 for the country as a whole
2) The proportion of holidays abroad including east-Germany counts for 66% of all holidays in 1992.

A strong growth (nearly 200%) in the number of holidays outside Europe can also be noticed, with market share rising from 7% (1985) to 13% (1990).

The private car is still the most intensively used mode of transport, decreasing slightly from a share of 60% in 1985 to 56% in 1991. The use of air transport strongly increased from 16% in 1980 to 27% in 1991, also linked to the fact that more German holidaymakers went for destinations outside of Europe. The use of touring buses remained relatively stable while transport by train is still loosing market shares.

The hotel is the main type of accommodation used by holidaymakers with its share increasing from 26% of all trips to 32% in 1991. Rented holiday dwelling picked slightly up (from 14% to 15%) ; the use of low budget accommodation (e.g. private rooms, boarding houses) is slowing down.

A growing number of vacationers take their main holiday outside the traditional period of July/August; 55% of all holidays were concentrated in these two months in 1986, decreasing to 51% in 1991.

Expenditure per person/per day rose from 71 DM in 1985 to 86 DM in 1991, an increase of 21%. In 1991 about one third of all expenditure on travelling abroad by EU residents came from German residents; in the period 1985-1991 expenditure on international travel increased by 47%.

United Kingdom

The participation of UK residents (60%) has in recent years been quite stable. The total number of holidays rose in the period 1985-1990 by 8% (49 million in 1985, 53 million in 1990).

In the same period the portion on holidays abroad developed from 32% (1985) to 38% (1990), resulting in a growth rate of 28%. In 1988 approximately 30% of holidays abroad were directed to Spain, for decades the most important destination abroad for british holidaymakers. This share dropped substantially to 23% in 1990. Outbound tourism to France, Italy and Greece, important destinations for UK-residents, has also slowed down.

In line with the increase of long-haul destinations, the use of air-transport in outbound tourism developed from 70% in 1985 to 77% in 1989.

The type of accommodation used during the holiday period is changing; more British used rented accommodation during holidays abroad in 1989 than in 1985. The share of rented accommodation increased from 13% to 22%. At the same time the proportion of hotel use decreased from 60% to 50%. Seasonality remains an important issue in European holiday taking. Concentration in July/August has weakend with regard to domestic tourism but remains unchanged for outbound tourism.

Expenditure per person/holiday increased by 26% (1985: 381£; 1989: 480£). In terms of the balance of payments, British travellers spent in 1991 about 55% more on international travel than in 1986.

3. Inbound tourism for the EU/EFTA-region

3.1 Introduction

The preceding paragraph focused on holidays taken by the EU population in terms of domestic and outbound tourism.
Attention is now focused on the development of international tourism in the EU/EFTA, generated from inside and outside EU/EFTA countries in the period 1986-1991/1992.
In this overview the registration of overnight stays in types of accommodation available in most countries is used.
Before presenting these results, two preliminary remarks are essential:

a. Overnight stays include shorter and longer holidays as well as business trips (in line with the broader concept of tourism demand, internationally agreed upon).

b. Not all types of accommodation occur in the registration; this counts particularly for private accommodation. For that reason, the volume of international tourism may be considerably larger than that derived from registered overnight stays. Furthermore registration regulations vary widely from country to country.

3.2 The global picture

The total number of observed overnight-stays from international tourism within the EU amounts to approximately 850 million in 1991. From the ratio between overnight-stays by residents and non-residents the total number of overnight-stays can be estimated to be about 2 billion. Assuming that only 60% of all nights are officially registered (a large number of nights in private accommodation for example are not counted) a more realistic number of 3.3 billion nights may be estimated.

This is still a minimum estimation since it can be assumed, that the real number of nights exceeds official figures even for those types of accommodation, which form part of the statistical assessment.

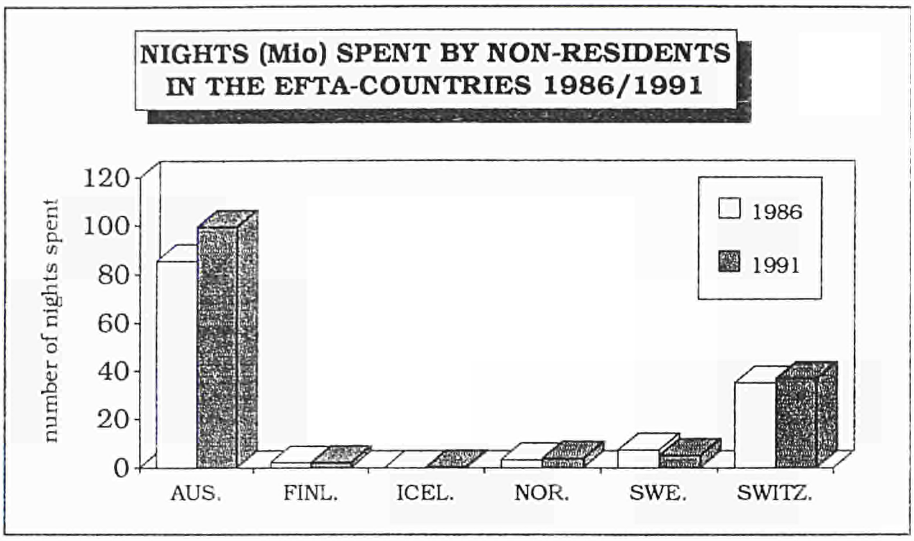
In developing this presentation distinction is made within the EU between the "Northern countries" as a main generating zone for tourism, France as an "intermediate zone" and the "southern countries" functioning to a large extent as a receiving area for tourism.

Overnight-stays of non-residents increased in EU countries during the period 1986-1991 by 8.5%. Growth rates for the Northern EU countries and France are approximately 16%, 12% respectively; the southern EU countries showed a decrease of 4%.

DEVELOPMENT OF NIGHTS SPENT BY NON-RESIDENTS IN EU REGIONS (Mio), 1986-1991

COUNTRY	1986	1991	variation in %
Northern part	224	260	16
France	332	372	12
Southern part	233	224	-4
TOTAL	789	856	8.5

Source: Eurostat



Source: Eurostat, National Statistical Offices

The overall market share of Portugal, Spain, Italy and Greece fell from 30 to 26%, in favour of the rest of the EU.

From 1986 until 1991, tourism increased in all member countries with the exception of Spain, which showed a sharp decline in inbound tourism (-14%) and Italy (-1%). Growth percentages differ strongly for individual countries.

A stagnation in inbound tourism can be noticed in the early nineties in most of the EU countries, expressed by falling growth figures and/or a decline in number of nights spent.

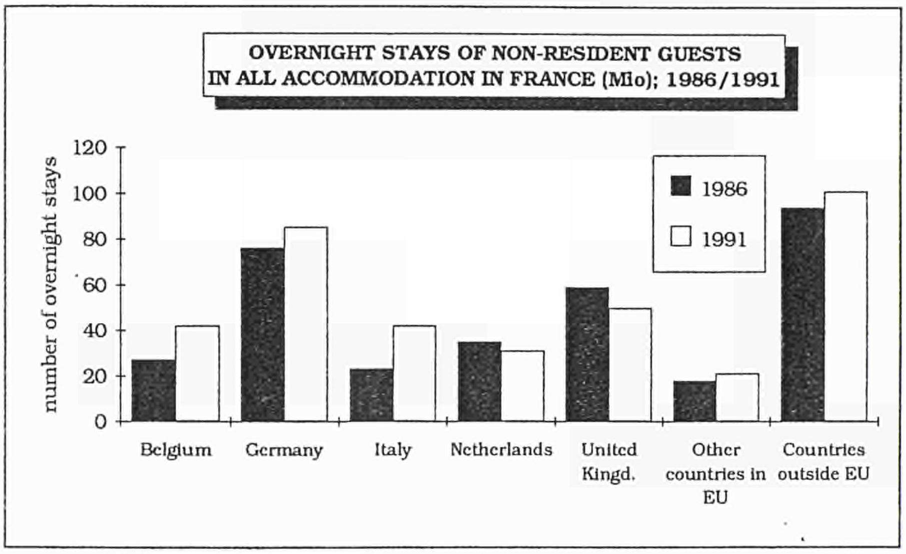
Taking 1990 to 1991, in most EU countries inbound tourism from long-haul areas outside EU/EFTA decreased. Decline is strongly noticed in the UK, having the biggest market share among visitors originating from countries outside EU/EFTA.

With the exception of Sweden, inbound tourism for the EFTA-countries increased during the period 1986-1991. The EFTA-region depends largely on visitors from EU-countries.

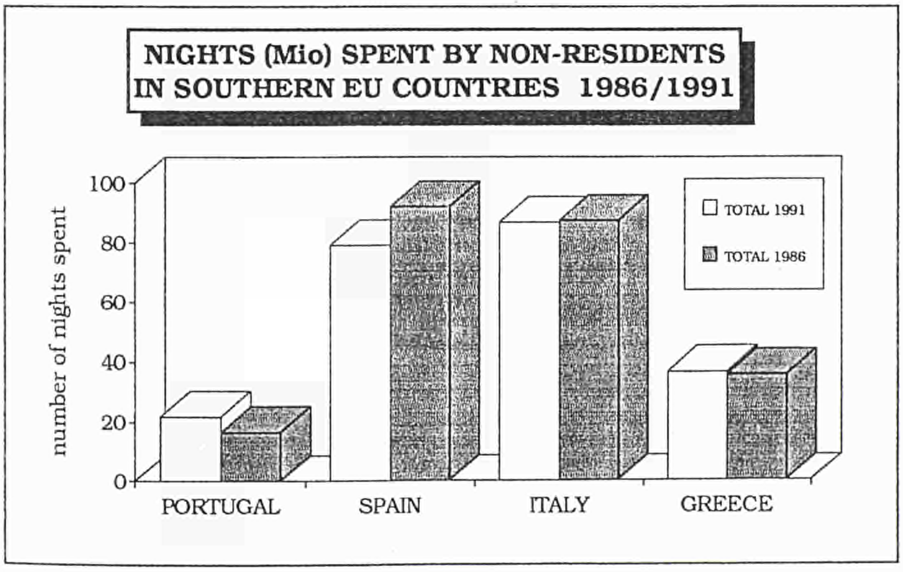
Germany is the most important generating country for the EFTA-region, representing approximately 55% of the total amount of inbound tourism.

3.3 Southern countries of the EU

The number of nights spent by non-residents in the 4 southern countries fell during 1986 to 1991 by 4%. Spain experienced a serious dropback of 13%; the decline in Italy was limited to less than 1%. The market-share of Portugal, however, improved considerably due to a 30% growth-rate in the number of nights spent by non-residents. Greece noticed a modest increase of 3%.



Source: Eurostat



Source: Eurostat

Within the southern countries Spain's market-share was reduced from 40% in 1986 to 35% in 1991. Portugal's market-share picked up by an additional 2,6%; Italy and Greece added 1% each to their former shares.

The Northern part of the EU generates about 75% of visitors to the southern countries, mostly originating in the United Kingdom and Germany, to some extend also in France.

A dramatic decline can be observed in the number of british visitors, as the following figures show: Spain (-43%), Greece (-30%), Italy (-19%) and Portugal (-4%). Increasing visits from Germany compensated to some degree the decline in british visitors, namely to: Spain (+10%), Portugal (+57%) and Greece (+40%). Nights spent by German visitors to Italy decreased by 6%.

EFTA-countries contributed with 10% to all nights spent by non-residents in Mediterranean countries. The number of nights decreased in Spain (-33%), Italy (-9%) and Greece (-7%); on the contrary Portugal observed a 72% increase.

3.4 France

France registered the highest number of non-resident nights inside the EU (approx. 44% in 1991), showing a growth rate of 12% from 1986 to 1991. In bound tourism in France relies strongly on visitors from other EU-countries namely from: Germany, the United Kingdom, the Netherlands, Belgium and Italy. Those five countries generate above 90% of all nights spent by non-residents.

3.5 Northern zone of the EU

Inbound tourism in the northern countries increased by 36 million nights (16%) during the reference period; the UK received almost 2/3 of the additional nights, showing a growth rate of 14%.

Unlike in the other countries, statistics on inbound visitors are based on the International Passenger Survey and cover all types of accommodation, including stays with friends and relatives.

Growth rates for inbound tourism are relatively high for Ireland (+79%) and the Netherlands (+36%).

Summing up, of all the nights spent by non-residents almost 50% are generated (in 1991) by EU-visitors, 10% by visitors from the EFTA-countries and about 40% by visitors from countries outside the EU/EFTA region. The latter are mainly concentrated on the United Kingdom. Analysing inbound tourism in the five larger northern countries of the EU, it can be seen that especially Germany, but also the UK seem to be the major places of origin.

Only in the UK do visitors from countries outside EU/EFTA represent the largest part of incoming tourists, while in the Netherlands, Germany, Belgium and Denmark non-EU/EFTA countries are not within the three top ranking places of origin.

3.6 EFTA Countries

Austria and Switzerland have a long tradition as resorts for summer and winter holidays. The importance of tourism for the economy of both countries is testified by the contribution of tourism to employment and the net account of the tourism balance of payments.

About 90% of all inbound tourism for the EFTA-countries is registered in Austria and Switzerland.

Austria

The number of nights spent by non-resident visitors grew from 1986 to 1991 by 17%. German visitors represent the most important segment, with a stable market share of 64% of all non-residents. The Netherlands rank second place, but their relative position (9% in 1991) became slightly less important in the period 1986-1991. The third place is held by the UK, which also showed a falling market share in the recent period (4% in 1991).

Switzerland

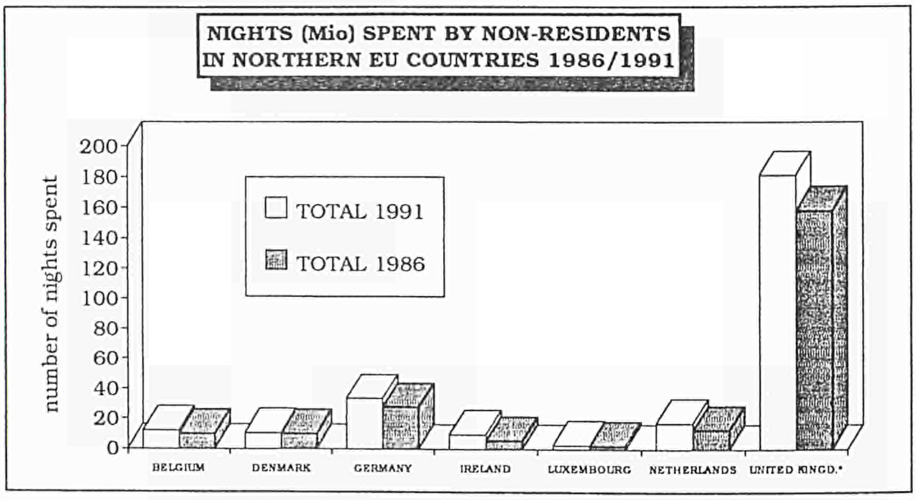
Regarding inbound tourism, Switzerland, it seems has reached a saturation point. Nights of non-residents only increased 6% comparing the years 1991 and 1986. Again Germany generates most of the nights spent in all types of accommodation (market share 1986: 42%; 1991: 44%). The Netherlands rank second place keeping a stable market share of 9%. Other important

EFTA COUNTRIES : NIGHTS SPENT IN ALL TYPES OF ACCOMMODATION BY VISITORS FROM EU, EFTA AND OTHER COUNTRIES, 1986-1991 (1986 = 100)

COUNTRY		EU	EFTA	non EU/EFTA	Total
Austria		116	139	116	117
Finland	(1)	140	98	94	110
Iceland	(2)	152	191	39	123
Liechtenstein	(3)				94
Norway	(1)	*	*	*	118
Sweden		55	97	100	79
Switzerland		104	106	114	106

1) nights in hotels
2) frontiers arrivals
3) reference years 1986-1992

Source: Eurostat, National Statistical Offices



* Estimates of total number of nights spent in all forms of accommodation based on International Passenger Survey; including stays with friends and relatives

Source: Eurostat

eurostat

countries of origin are: Belgium/Luxembourg, France, Italy and the UK (market share together 25%, remaining stable from 1986 to 1991).

3.7 Summarising tables on EU/EFTA inbound tourism

A summary regarding the development of all origin-destination relations for the EU/EFTA region 1986/1991 is presented in the annex of this chapter.

4. The near future

Leisure behaviour, including the holiday-segment, is influenced greatly by changes in the macro-environment like the economic situation or political events but also by changing consumer preferences and marketing activities of entrepreneurs.

Concerning EU/EFTA region as a touristic market, some main factors will have a significant impact on tourist flows in the near future.

4.1 Macro economy

As noticed before, the development of tourist regions within the EU depends highly on generating capability in the EU itself. A major factor will be the high rate of unemployment in the Union. Moreover, monthly surveys of the European Commission show, that consumer confidence is still

INBOUND TOURISM IN THE NORTHERN PART OF EU; variation in % for the three main countries of origin (overnight stays 1986/1991)

Belgium		
Netherlands	1)	32%
Germany	2)	36%
United Kingdom	3)	8%
France	4)	24%
Denmark		
Germany	1)	19%
Sweden/Norway	2)	37%
Netherlands	3)	5%
Germany		
Netherlands	1)	
USA	2)	
United Kingdom	3)	
Netherlands		
Germany	1)	28%
United Kingdom	2)	82%
Belgium	3)	25%
United Kingdom		
Countries outside EC/EFTA	1)	9%
Germany	2)	39%
France	3)	22%

Source: Eurostat, estimations

EU COUNTRIES : NIGHTS SPENT IN ALL TYPES OF ACCOMMODATION BY VISITORS FROM EU, EFTA AND OTHER COUNTRIES, 1986-1991 (1986 = 100)

	EU	EFTA	non EU/EFTA	Total
Northern part EU region				
Belgium	129	132	94	123
Denmark	118	137	107	123
Germany	122	127	113	120
Ireland	--	--	--	179
Luxembourg	122	115	107	125
Netherlands	142	122	113	136
United Kingdom 1)	124	105	109	114
France	114		107 (2)	112
Southern part EU region				
Greece	106	93	--	104
Spain	86	67	93	86
Italy	93	91	148	99
Portugal	135	172	105	132

1) Hotels and similar establishments
2) non EU

Source: Eurostat, estimations

falling. Main reasons for this include the expected financial situation of households and rising unemployment.

The UK and Germany are the main tourist generating countries in the EU. Recent recovery in UK gives grounds for a more positive picture of consumer confidence. On the contrary consumer confidence in Germany tends to be on a downswing.

The fact that inflation has been falling below 4% in Europe can be considered as positive regarding price-indices for tourist services.

Devaluations of Italian, Irish, British, Spanish and Portuguese currencies have encouraged inbound tourism to those countries. It seems that positive spin-offs are already there regarding inbound tourism for Spain, reflecting the fact that devaluations of the peseta lowered its value by 20% against other European currencies within 8 months (1992, 1993).

The recession at the beginning of the eighties showed only a limited decrease in the volume of tourism, due to the fact that consumers have many possibilities in substituting rather expensive products. Tourism as such is increasingly becoming one of the primary goods within the framework of total consumption.

One possible consequence is that an accelerating economic recession could be an advantage for the growth of domestic tourism at the cost of outbound tourism. As a matter of fact, lately fewer Italian and Spanish residents have been leaving the country, while at the same time, domestic destinations have received more resident visitors.

4.2 Transport

Clearly the number of holidays to destinations outside Europe is growing at a faster rate then the number of holidays taken within Europe. Destinations in North America and South East Asia are more competitive since tariffs for air transport became less expensive.

It can be expected that over capacity in air transport will continue to stimulate the outflow of tourism from Europe in the near future. Air companies do not expect a considerable drop in prices on European routes.

Improved links to the European road network could help Portugal to increase its market share, while in the case of Greece an increase in charter air-traffic and further increases in airport capacity are major factors in the further expansion of the holiday industry.

The opening of the Channel Tunnel will offer new options for british holiday-makers for leaving the country by car. At present some 70% of the British residents fly to their holiday destination.

In the meantime ferry companies are in the process to introduce new time-saving ferryboats.

4.3 Consumer behaviour

Taking the level of holiday participation regarding "4+" overnight trips most of the northern countries in Europe approach saturation. The market for international short breaks in the EU seems to further increase, with specific potential for city-visits. In the southern part of the Community, Italy and Spain have been a generating market for tourism to other european countries. However, the economic situation in those countries will limit the volume of outbound tourism in favour of domestic holidays.

The mobility of holiday makers in terms of changing destinations, seasonality and more active behaviour is increasing. Present trends indicate that holiday makers preferences are shifting away from traditional products offered by sun resorts to more "cultural" activities ("cultural" to be understood in a broad sense).

Increasing experience of taking holidays by a growing portion of the EU population will promote more extensive decision making by the consumer. The ratio quality/prices of tourist services is more and more taken into account.

Traditional holiday areas like the Mediterranean, providing sun and beaches as their main selling features, will experience stronger competition from comparable areas and from destinations offering a more diverse tourism supply.

4.4 Competition

It must be recognised that the growth of international tourism within the Union has been slowing down since 1990. Whereas more european tourists participate in intercontinental travel conversely tourism originating from long-haul areas to Europe has decreased. Regarding the EU home market, tourism to Spain and Italy decreased; a relatively small increase could be noted for Greece. Important EU markets for France, like the UK and the Netherlands, showed recently a negative development.
The slow down in the rate of inbound tourism to the EU region as described, together with the strong expansion of tourism supply in the eighties, is putting pressure on the profitability of the tourist industry. This is one of the major reasons for the growth of competition in the European industry. The interaction between demand and supply can e.g. result in lower prices for travel packages and accommodation. Discounts for Europe's best hotels were offered in the summer season of 1993, with rates sometimes being cut by up to 50%.
Travel agencies are facing a trend towards last minute bookings; consumers become aware of existing over capacities and try to buy at bottom prices.

We already mentioned the decline in air tariffs caused by a strong increase in carrier capacity between 1982-1990 and low occupancy rates.

To summarise, it can be expected, that competition between destinations inside and outside EU/EFTA will continue. A further increase in tourism demand may lead to faster product development substituting traditional "holiday-products" by services for specific target groups.

4.5 Expected shifts in origin-destination flows

In- and outflow patterns

Tourist inflow by residents of eastern Europe and more specificly the former east-Germany directed to traditional destinations for mass tourism in Spain, Italy and Austria will continue. Nevertheless the economic take-off, which will be a condition before tourist flows from the east turn into mass tourism, will take some years. Decreasing air fares will stimulate outbound tourism from the EU to long-haul destinations. Tourism to Turkey will suffer due to the image of unsafety caused by acts of terrorism. Spain, Italy and Greece will benefit from this situation, as they will take over a part of the ex-Yugoslavia market.
Tourism from EU/EFTA countries will have a strong economic impact on Eastern Europe in countries like Poland, the Czech Republic, Slovakia and Hungary.

The northern zone

With the exception of Ireland, the northern countries of the Community are marked by relative high and rising standards of living, resulting in an ongoing increase in the tourism volume.
The total volume of tourism (domestic and inbound) from these countries may reach a saturation point. Economic uncertainty may interrupt the growing share of outbound tourism compared to domestic tourism in the near future. International tourist flows within the northern zone increased in the period 1986-1991 for almost all origin-destination flows.
A growth in the popularity of city breaks and other short holidays, which are strongly promoted by the travel industry, can be expected.
Most holidays are taken during the summer with France and the Mediterranean being the main destinations. According to recent trends, market shares for Greece and Portugal should accelerate at the expense of Italy and Spain.
Overcrowding in the peak season, with a shortage of supply and relative high prices, will become a more important factor in decision-making by tourists, who will have to calculate under budget constraints and will try to switch to low season periods or less expensive destinations.

The southern zone

It is evident that southern Community countries produced in recent years have high growth rates, in terms of international tourism inside the EU. Italy and Spain, in particular, became promising new markets for holiday destinations in the northern part of Europe.

ANNEX

Nights spent by non-residents in all types of accommodation in EU countries generated by EU, EFTA and other countries

% variation 1986 - 1991

countries of destination→ / countries of origin↓	BL	DK	DE	GR	SP	FR	IR[1]	IT	LX	NL[2]	PT	UK
Belgium	•	(*)	36	68	-/- 47	56	(*)	2	4	25	74	38
Denmark	60	•	4	-/- 20	-/- 32	-/- 24	(*)	-/- 3	67	13	7	-/- 30
Germany	36	19	•	40	10	12	(*)	-/- 6	31	28	57	16
Greece	26	(*)	34	•	(*)	(*)	(*)	21	72	(*)	125	6
Spain	34	(*)	61	74	•	100	(*)	48	80	49	54	55
France	24	15	24	-/- 4	7	•	(*)	-/- 11	49	75	25	22
Ireland	39	(*)	60	(*)	(*)	(*)	•	-/- 5	8	48	46	10
Italy	48	86	57	+ 53	(*)	89	(*)	•	138	186	120	47
Luxembourg	8	(*)	42	(*)	(*)	(*)	(*)	-/- 17	•	32	72	32
Netherlands	32	5	13	-/- 4	(*)	-/- 11	(*)	-/- 2	19	•	90	39
Portugal	134	(*)	77	(*)	(*)	57	(*)	66	(*)	(*)	•	63
United Kingdom	8	-/- 2	16	-/- 30	-/- 43	-/- 15	(*)	-/- 19	19	82	-/- 4	•
Total EU	29	18	22	6	-/- 14	14	(*)	-/- 7	22	42	31	24
Total EFTA	32	37	27	-/- 7	-/- 33	(*)	(*)	-/- 9	17	26	72	5
Total countries outside EU/EFTA	-/- 6	7	13	(*)	-/- 7	(*)	(*)	48	7	13	5	9
Total general	**23**	**23**	**20**	**4**	**-/-14**	**12**	**79**	**-/- 1**	**21**	**36**	**32**	**14**

Nights spent by non residents in all types of accommodation in EFTA countries generated by EU, EFTA and other countries

% variation 1986 - 1991

countries of destination→ / countries of origin↓	AT	SF	IC	NO	SW	CH
Austria	•	-/- 6	82	(*)	(*)	16
Finland	140	•	450	20	-/- 14	0
Iceland	(*)	-/- 15	•	(*)	(*)	(*)
Norway	-/- 20	-/- 38	18	•	-/- 55	-/- 10
Sweden	4	-/- 2	55	24	•	-/- 3
Switzerland	60	-/- 9	133	(*)	4	•
Total EU	39	-/- 2	91	(*)	-/- 45	6
Total EFTA	16	40	52	(*)	-/- 3	4
Total countries outside EU/EFTA	16	-/- 6	-/- 60	(*)	0	13
Total general	**17**	9%	**23**	**18**	**-/- 21**	**6**

• = domestic tourism

(*) = not available

(shaded) = negative percentage

1) Hotels and similar accommodation

2) 1988-1991

Source: Eurostat, OECD

TOURISM IN EUROPE

Impact

eurostat

1. Some Preliminaries

In the last decades tourism has become a pervasive phenomenon affecting almost all parts of the world, despite sometimes unfavourable economic and political circumstances. Europe has always represented a focal area, as a destination as well as an origin of touristic flows. An important step towards integration and liberalisation, like the creation of the European Economic Area (EEA), may give rise to some reconsideration of the overall situation of tourism in Europe, its importance in macro-economic terms and its trends in the immediate past, which are likely to continue.

Legitimately, its has often been maintained that tourism is a complex, "multifaceted" topic, not easily defined by some clear-cut one-dimensional criteria nor easily grasped by statistical tools, like the common surveys on overnight stays etc. Indeed, tourism is dependent on and interwoven with national, cultural and social environments.

It thus requires an open approach of statistical evaluation, addressing the immediate tourist flows and related economic preconditions and consequences as well as the broader framework in which it is embedded. A more comprehensive even "qualitative" approach is needed to understand Tourisms' dynamics, its motivations, its economic bases and its consequences on societies.

Within such an attempt of comprehensive description the macro economic discussion can contribute only a partial view, to be complemented by thorough additional investigation. However, the first purpose is simply to create an overall reference framework in order to appreciate the topic in the usual terms of basic analysis. At the same time there are undoubted interlinks, and interactions between the levels of standard of living achieved on the one hand and tourism on the other hand. Increasing purchasing power is a main precondition of touristic activity of the population. Similarly, tourism is often used as a means of promoting the earning capacity of the population, and consequently economic development as a whole. All this is perfectly true in the European context. Therefore, in European macro-economics a good deal of this story is reflected.

Accordingly, a macro-economic discussion is attempted in the customary terms of GDP (Gross Domestic Product) and private consumption, related population figures, and in particular in the tourism balance of payments (BOP). Starting with elementary steps, interesting tourism related patterns can be observed, even without immediate reference to tourism as such.

A strong focus is still based on the international flows of tourism, although just recently the importance of the residents' tourism in the home country has received major attention, and even the segment of excursions or day visits has been pointed out as no longer negligible[1]. Therefore, if these segments are not equally represented in the statistical evaluations, this seems to point to deficiencies in the traditional reporting systems rather than to continued insufficient awareness of these substantial components of tourism as a whole.

A fact simply resulting from the size of the countries may also be noted in this context, i.e. the importance of outgoing tourism automatically reduces in proportion to the increasing size of a country. A macro-economic discussion also benefits from the inclusion of related indicators like quantities of tourism demand represented in flows of people travelling, or staying overnights etc. as well as certain macro-key indicators related to capacities and use of facilities.

For statistical reasons (a lack of integrated reporting in the past) the EEA-wide information base varies as regards completeness and comparability. For this reason, a some-what impressionistic rather than a fully and equally articulated description is often the result.

Cross section as well as analysis over time has been used, with a time span of about ten years thought to be appropriate. Focusing on Europe, the relative situation world-wide and/or the

1) cf. the Resolutions of the WTO's Ottowa-Conference on Tourism Statistics, 1991.

importance of non-EEA countries is addressed only occasionally, i.e. when non-European ingoing or European outgoing tourism is examined.

2. The Economies as a Whole

In the EEA[2)] a number of widely differing countries are assembled, many of considerable size as regards territory, population and economic potential, others rather (and sometimes extremely) small. Substantial variation is also found as regards the level of economic development. Macro patterns of this kind are first outlined in terms of population and the familiar national accounts main aggregates.

The four largest countries in the EEA alone account for more than 60 % of the whole population, when Spain is included they account for more than 70 %. This group is clearly distinguished from the other smaller countries, the largest country of them (NL) only about one quarter of one of the larger countries (14.9 %). In particular all EFTA countries in the EEA fall within the group of small-sized countries. The overall situation is reflecting a basic predominant structure, which is largely maintained in terms of Gross Domestic Product, too. However, when ranked by size, a certain variation results within the two sets, according to the comparison made based on either population or GDP: obviously, this variation is due to different per capita output levels achieved.

2) In the present discussion for its outstanding touristic importance Switzerland has been taken into account like any of the countries applicant for the EEA. The smallest units, i.e. Iceland and Liechtenstein, have been omitted, mainly for data reasons.

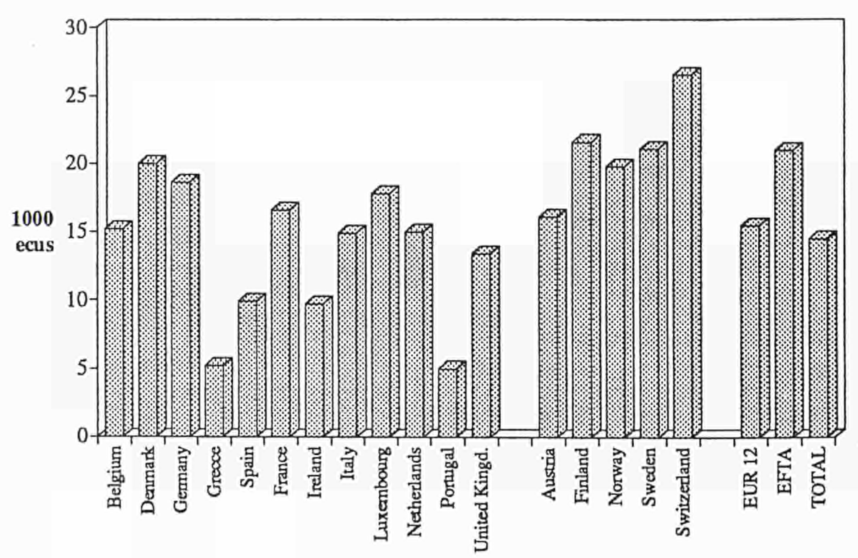
BASIC AGGREGATES, 1991

COUNTRY	Population (Mio)	GDP at current prices (Mrd ecu)	PHFCE* at current prices (Mrd ecu)
Belgium	10	151.5	93.8
Denmark	5.1	101.8	54
Germany**	63.2	1 178.2	705.4
Greece	10.1	52.5	37.6
Spain	39	387.6	241.7
France	56.4	938.9	565.7
Ireland	3.5	33.9	18.5
Italy	57.7	861.8	531
Luxembourg	0.4	7.1	3.9
Netherlands	14.9	223.3	129.3
Portugal	9.4	47	29.6
United Kingdom	57.4	768.5	486.9
TOTAL EU	327.1	4.752.1	2 897.4
Austria	7.7	123.9	68.7
Finland	5	108.2	56.5
Norway	4.2	83.3	42
Sweden	8.5	179.5	93
Switzerland	6.7	177.5	101.3
TOTAL EFTA	32.1	672.5	361.5
TOTAL EU/EFTA	359.2	5 424.6	3 258.9

* Private Household Final Consumption Expenditure
** ex - West Germany

Source: Eurostat, OECD

GDP PER CAPITA AT CURRENT PRICES, 1991 (IN 1000 ecus)



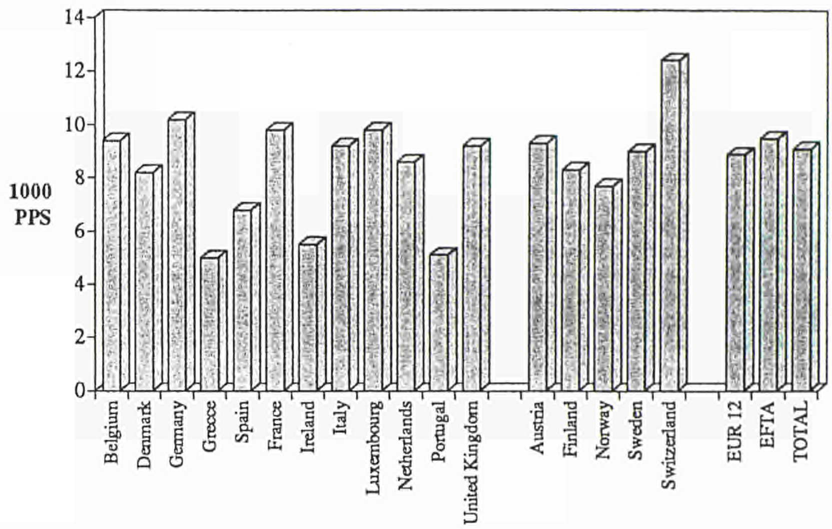
Source: Eurostat, OECD

Accordingly, on a GDP basis, among the larger countries France and Germany appear to be in the best position; among the smaller EU countries this applies to Belgium and Denmark, and within EFTA to Switzerland.

Differences are much more pronounced when the comparison is based on a standardised measure, like per capita output (inhabitants). In this case, Denmark and Luxembourg improve substantially, Belgium more moderately. Of the EFTA countries Switzerland, Finland and Norway improve. In an overall list, per capita output achieved in the EFTA countries would give most of them top places; even Austria would rank above average. The whole EFTA Group accounts for about 10 % of the EU in terms of population, but 13.5% in terms of GDP.

With a view to tourism it may not seem sufficient to provide a uniform evaluation based on ecu but the differences of purchasing power should be taken into account (purchasing power standards: PPS). The result is first noteworthy because of a substantial narrowing of the width of variance, as compared with the previous presentation (EU: factor 3.9 vs. 2.6; EFTA: 1.6 to 1.3). This effect is common in conversions on the basis of purchasing power parities (PPP), reflecting more favourable purchasing parities on the home market. Apart from this, it seems noteworthy also that only a few changes occur, in that Luxembourg takes the lead, and France

PRIVATE HOUSEHOLD FINAL CONSUMPTION EXPENDITURE PER CAPITA (IN 1000 PURCHASING POWER PARITIES [PPS]),1991



Source: Eurostat, OECD, calculations

improves slightly, but most ranks are left unchanged. In the EFTA, with the exception of Switzerland which maintains the highest standard, all countries are on a similar level. One might argue that with a view to tourism an even more specific indicator may be chosen, like private household final consumption expenditure (PHFCE, preferably expressed in PPS also per capita). The width of variation that way further reduces (EU: factor 2.1). Otherwise, even then, only a few changes are recognised, in that UK (United Kingdom) and Belgium improve whereas Denmark looses substantially[3].

In the EFTA Switzerland keeps first place. Similarly to GDP per capita, the other EFTA-countries represent a largely homogeneous group in terms of real private consumption levels.

On the whole, a relatively stable overall pattern in macro economic terms may be summarised, characterised by a "dual" basic structure of a set of large countries on the one hand, and mostly small sized countries on the other hand. Standardisation allowing for more direct accounting of economic development brings a couple of smaller countries to the forefront, thanks to their high levels of industrialisation and general economic prosperity. However, even then relatively stable patterns may be summarised, irrespective of the kind of valuation or economic variable referred to. An above average group within the EU may be recognised, consisting of Luxembourg, Germany,[4] France, Denmark, Belgium, Italy, Nether-

3) The case of DK is explained by conceptual reasons : this country covers relatively large segments in government consumption which are elsewhere within the scope of PHFCE.

4) In the whole exercise Germany is shown as within the borders of before 1990.

lands and UK. All EFTA countries are within the above average group.

With a view to tourism a few self evident conclusions may tentatively be drawn, since the larger and/or the more developed countries are obviously the primary candidates generating substantial tourist flows, at least in absolute terms. On the basis of macro-economics alone no such conclusion can be drawn with a view to destinations (although a probability of the larger countries to attract larger flows may be suspected).

Obviously, however, such an evaluation does not tell too much about the relative position and role of tourism in the macro-economic environment, nor whether economies may be characterised as "touristical", or as a main destination, or as a country of origin.

3. Touristic characters

It is, of course, not appropriate here to express in detail the well known, specific touristic nature of the various European countries. However, in macro-economic terms interesting features can be exposed, combining various macroeconomic statistics themselves and/or related indicators. Therefore an overall "macro typology" of the countries, is attempted with a view to their capacity as origins of touristic flows as well as their actual role as a destination for travellers. For this purpose a macro indicator like overall guest nights spent is useful. It may be further broken down as suitable, and related to GDP, in order to provide additional insights.

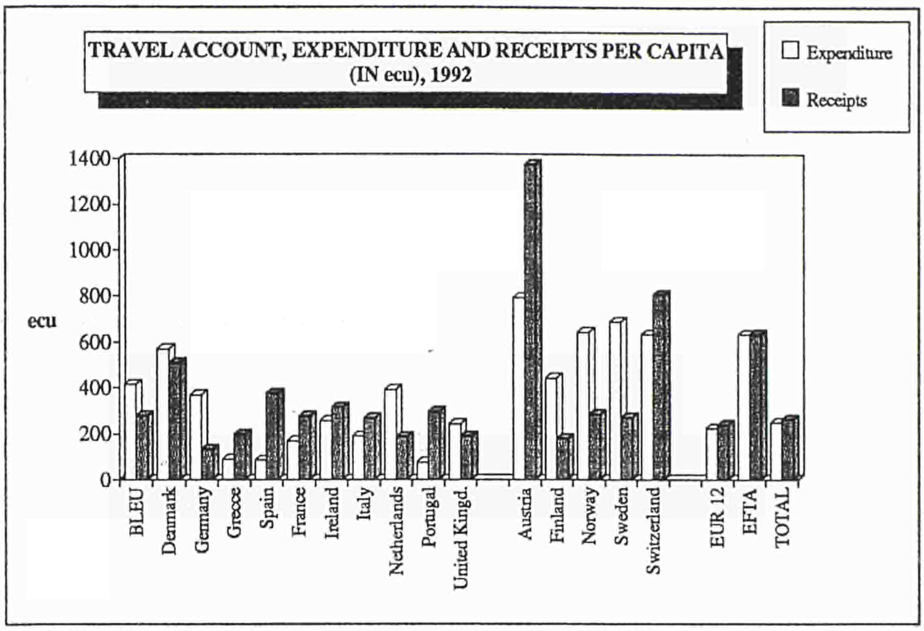
It turns out that largely the same countries which are dominant concerning the GDP also dominate in terms of overall guest nights spent, whether by residents or non-residents. Leading is, somewhat surprisingly, the UK, followed by Germany, Italy and France. In the EFTA only Austria reaches a level comparable to the larger EU countries, followed by Switzerland. Counting non-residents only, from the larger countries' group (apart from the UK) the "classical" tourism-countries remain: France, Italy and Spain. In the EFTA it is again Austria, which is top-ranking. If the same data is linked to the population, tourism intensity is calculated (i.e. guest nights per inhabitant).

This produces an outstandingly interesting feature. In the EU almost all countries show intensities ranging from 3 1/2 to 4 1/4 nights, the exceptions being Ireland, Luxembourg and the UK. Out of the EFTA countries, Austria is taking a clear lead (16 tourist nights per capita), followed by Switzerland. The outstanding tourism capacities of Austria are even more salient if one refers to non-residents only. However, the uniform general outcome mentioned before is not repeated here, which points to the effect of domestic tourism of residents tending to level out stronger discrepancies between countries regarding the number of international tourists. Somewhat surprisingly, this effect appears to be similar in the smaller as well as in the larger countries.

Taking a more specific approach, nights spent in hotels and similar accommodation alone may be referred to. Apart from the UK (figures not completely available) more or less similar patterns as before turn out in absolute figures, but much less so in terms of intensities, and if further broken down (at least on the EU part). Highly "touristic" countries like Greece, Italy, Spain and Portugal show relatively high proportions for hotel guests altogether, but vary as far as the origin of the guests is concerned (high proportion of residents' tourism in Italy and Spain).

In the EFTA the discrepancy between countries is less obvious, but still the tourism "super powers" Austria and Switzerland are dominant over the whole EEA. On a somewhat lower scale, the earlier pattern is almost perfectly repeated when linked to non-residents. Altogether, the non-residents market is mainly shared between Spain, Italy, Austria and France in the first instance, followed by Germany, Switzerland and Portugal.

Concluding on a "quasi-macro level" this comparison immediately shows the "main receivers" of touristic flows. In the EU the "grand receivers" are largely identical with the large economies, whereas intensities more specifically point to the classical destinations. To this overall



Source: Eurostat, OECD

pattern EFTA contributes in addition two small but touristically extraordinarily powerful destinations (Austria and Switzerland), whether considered in absolute or in relative figures.

While "nights spent" in a country are the most useful indicator to evaluate its character as a destination, its role as an origin of tourist flows is no less interesting. Indicators of this kind, which are non-monetary, are arrivals and nights spent by tourists of a certain country. As a monetary indicator, travel receipts/expenditure are recorded in the balance of payments (BOP). Nights spent within the country of residence are interesting in parallel.
Travel expenditure abroad is playing the major role in Germany, followed by the UK, Italy and France. A next group is formed by mostly small but "fond of travelling" countries, like the Netherlands, Belgium and Luxembourg, and Austria, Sweden and Switzerland. Again some standardisation is indicated on a per capita basis. A clear small country hierarchy on the propensity of travelling abroad emerges, with Austria and Switzerland at the top (about 800 ecus and 700 ecus per person, respectively), followed by Norway, Denmark, Sweden, Finland and the BLEU. In a second group the Netherlands, Germany, the UK and Ireland are found, followed (rather far behind) by Italy and France. The other countries are falling below the 100 ecu per inhabitant threshold.

Returning to the discussion on the GDP etc., an overall characteristic of countries as receiving destinations as well as origins of outflows may be given. This may be based in the first instance on the number of nights by a certain portion of GDP (e.g. 1 Mio. ecu).

According to this indicator EU-countries most heavily reliant on tourism are Greece, the UK and Portugal, followed by Luxembourg, Ireland, and Spain. Italy, France and all others form a group with a rather moderate and similar intensity in terms of nights per GDP unit. On the EFTA part Austria (the highest figure) and Switzerland are ranking first, all others show a lower intensity than any EU country.

Tourist expenditure abroad can reveal the relative significance of the international market. If related to GDP or PHFCE characteristic propensities and differences in touristic behaviour may appear. Here a considerable degree of symmetry in ranking can be summarised. Overproportional propensities for spendings abroad are indicated for Denmark, BLEU and the Netherlands (exclusively small countries, as expected).

Concerning expenditure abroad Austria, ranks top in the EFTA again, although the gap is not as pronounced as for other indicators. In terms of expenditure abroad by GDP shares, an almost perfect symmetry with the ranking by absolute level arises, the only exception being the UK (where the GDP share is relatively higher). The same hierarchy is less smooth for the EFTA states. On the whole the higher shares are achieved by the smaller countries, which is in line with a priori expectations.

Focusing on the residents' behaviour the overall picture becomes complete. A group of 6 leading EU countries can be identified as being most tourism intensive, both on the home market as well as abroad :

- Belgium/Luxembourg
- Denmark,
- Germany,
- Italy,
- the Netherlands,
- the United Kingdom

Within EFTA, Austria and Switzerland show the highest intensity. Even the other countries are mostly beyond EU levels.

Altogether, while based on macro information only, this cross sectional analysis has brought about a range of macro-indicators on the relative importance of tourism for the countries as well as on the relative importance of countries for tourism. Some results certainly differed from those commonly expected. Subsequently, further aspects will be added in terms of macro information, mostly presented in their development over time. Through this, the interaction between business cycles and tourism as well as its own developmental dynamics will come into the picture.

3.1 A Decade of Tourism in Europe

In the EEA the eighties have seen an accentuated, long lasting business cycle. Starting from almost zero growth at the beginning, real GDP-growth steadily gained momentum, to peak around 1988. After this, the downswing started with growth rates smoothly decreasing. Of course, by countries or subgroups like EU or EFTA this overall pattern varies. The average p.a. growth rate (GDP, 1985 prices) was +2.3 %, falling into a range between + 3.7 and 1.6 %. For the present purpose a broad basis of reference would seem more appropriate, enabling long term evaluation without being too influenced by more or less incidental circumstances.

During the first half of this decade the results for the EFTA, in terms of growth rates, were consistently higher, whereas after this the greater dynamics was on the part of EU. Due to its rather small statistical "weight", the overall growth pattern in the EEA largely resembles that of the EU.

Under the premise that tourism is largely correlated with the business cycle, its average growth as well as its immediate

BOP, TRAVEL ACCOUNT 1980-1991 (in Mrd ecus)

	Total Receipts			Total Expenditure			Balance		
	EU	EFTA	EU/EFTA	EU	EFTA	EU/EFTA	EU	EFTA	EU/EFTA
1980	30.6	8.6	39.2	31.4	6.8	38.2	-0.8	1.8	1
1981	36.3	10	46.3	35.9	7.6	43.5	0.4	2.4	2.8
1982	41.5	11.1	52.6	41.5	8.2	49.7	0	2.9	2.9
1983	45	12	57	38.2	9.2	47.4	6.8	2.8	9.6
1984	52.8	13.2	66	41.9	10.1	52	10.9	3.1	14
1985	57.8	14.1	71.9	45.5	12.5	58	12.3	1.6	13.9
1986	57.3	14.7	72	50.2	14.1	64.3	7.1	0.6	7.7
1987	60.6	15.9	76.5	56.4	15.9	72.3	4.2	0	4.2
1988	65.1	17.5	82.6	62.9	18	80.9	2.2	-0.5	1.7
1989	71.4	18	89.4	68.3	18.1	86.4	3.1	-0.1	3
1990	78.4	20.4	98.8	73.3	20.3	93.6	5.1	0.1	5.2
1991	81.8	21.6	103.4	78.2	20.3	98.5	3.6	1.3	4.9

Source: Eurostat, OECD

BOP, Travel Account 1981-1991 (change in receipts p.a., in %)

	EU	EFTA	EU/EFTA
1981	18.63	16.28	18.11
1982	14.33	11	13.61
1983	8.43	8.11	8.37
1984	17.33	10	15.79
1985	9.47	6.82	8.94
1986	-0.87	4.26	0.14
1987	5.76	8.16	6.25
1988	7.43	10.06	7.97
1989	9.68	2.86	8.23
1990	9.8	13.33	10.51
1991	4.34	5.88	4.66

Source: Eurostat, OECD

development would show similar patterns, in particular for large areas in which most tourism flows become "internal". If it is true what is often stated, namely that tourism is more dynamic in relative terms, its average growth would be stronger.

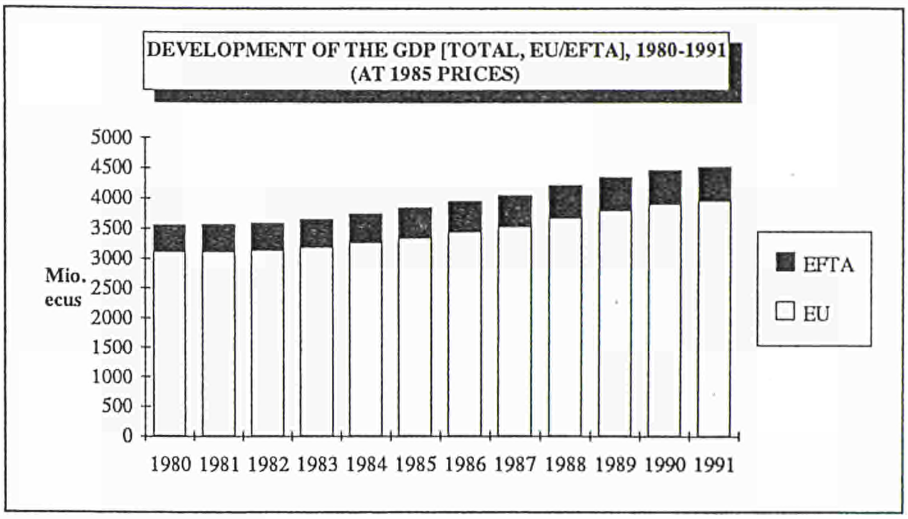
Probably the most suitable indicator on tourism activity is nights spent[5]. For a sample of EU-countries (chosen for statistical reasons)[6] nights of all types of tourists (residents and foreigners) in all type of accommodation generally shows a somewhat stronger than proportional growth of tourism in the period before 1985, and a somewhat weaker outcome after. Thus, over the whole period 1980/1991 the relative extent of real expansion may have come closer to the GDP.

In the EFTA the pattern appears to have been the other way round, with underproportional results throughout the first half of the eighties, and a more favourable outcome in the second half of the decade.

If tourist nights spent in hotels etc. were referred to alone, the results may have been weaker during the first half, and only slightly stronger but still likely below the GDP growth during the second half. EFTA patterns would not seem to have been much more dynamic, at least as regards Austria and Switzerland.

5) Though seemingly simple, this indicator is still not invariably available.

6) B, DK, GR, I, L, P, E



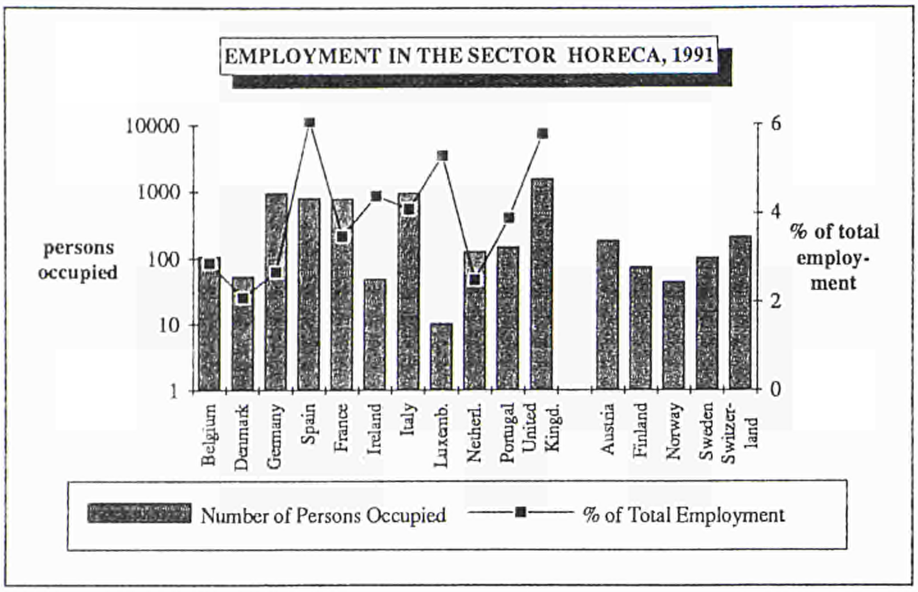
Source: Eurostat, OECD

As a further central indicator (much better supported by available data) nights spent by foreign tourists in all kind of accommodation may be addressed. In this case mostly overproportional rates result for the EU, whether general accommodation or hotels and similar establishments are referred to. Mostly underproportional outcome in both accommodation types is stated for the EFTA.

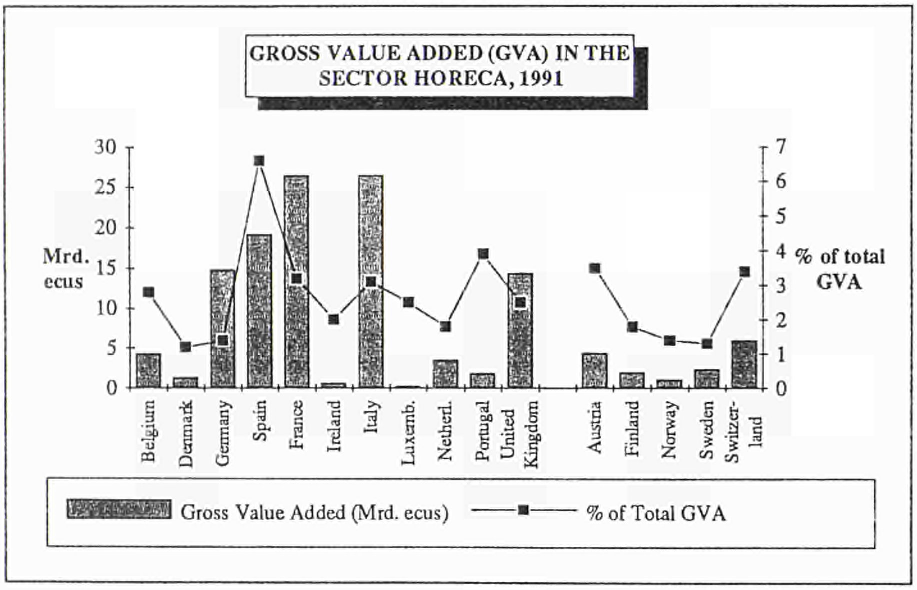
All this seems to support the conclusion, that relatively high dynamics of tourism as compared with the GDP is not easily be proven. In parallel, a shift towards increasing demand for high level accommodation can be noticed. On the whole, however, including resident tourists visiting their own country the real development of tourism seems to have been concordant with the development of the GDP.

Earning capacity of tourism is reflected in a current price based reference frame rather than in real terms. Usually, the generally available receipts on the BOP travel account are used as a key indicator. In the EU the overall ratio ("share in") for foreign exchange received from tourism to the GDP amounted to 1.4 % in 1980, increased to 1.7 % by 1985 but stagnated then (1990: 1.68). The degree to which countries rely on this type of BOP receipts at the beginning varied between less than 1 % (Germany: 0.6 %) up to 6 %) (Portugal: 5.6 %, Greece: 6.6 %). France and Italy known as highly touristic countries showed only 1.2 and 1.8 %, respectively. The share decreased consistently in Greece, was more or less stable in Germany (around 0.7 %) and otherwise varied or increased more or less significantly. Levels of 3 and more % are achieved in Portugal, Spain and Greece, and somewhat surprisingly, also in Ireland. The % share of travel receipts recorded for Denmark and the BLEU is still higher than for Italy.

In the EFTA the overall share in 1990 was about twice as high as in the EU. With a GDP ratio higher than 8 % Austria again is



Source: Eurostat, OECD, calculations



Source: Eurostat, OECD, calculations

in the EEA in an exceptional position.

In absolute figures this reference shows more pronounced development patterns than the previous ones. However, changes in structural terms are more limited, especially in the second sub period of this decade. In most instances also the "share of the cake" of EU overall travel exchange receipts did not change very much, perhaps with the exception of Greece leading and Portugal and Spain gaining quite significantly.

3.2 Tourism in the Economy

One of the questions frequently asked in this context concerns the relative importance of tourism mainly in terms of GDP shares, but also in terms of employment. However, to such questions there is no simple answer, for the very nature of tourism itself which is on the supply as well as on the demand side based on a branched composite concept far from immediate clear-cut comprehension. Thus, any answers are either based on model type evaluations, depending on preliminary assumptions often with an ambiguous outcome, or on approximations in terms of more basically designed statistics. This is the approach referred to in this case.

On the supply side key indicator groups are easily selected, being of utmost (although not exclusive) significance for tourism. First there is the hotel industry (in its widest understanding), plus catering (HORECA), next there are the wide fields of transportation and tour organisation, and last but not least, there are cultural entertainment, sporting and other recreation facilities. Relatively predominant positions may be expected for those activities in the highly touristic countries, which would become more pronounced the closer the regional demarcation coincides with touristic areas. However, even in macro-terms such differences can be retracted if descriptive data are at hand (which is not always the case, yet).

In a highly touristic country like Spain the number of persons employed in the HORECA sector accounts of the overall population for e.g. 2.0 %, as compared to 1.5 % in Germany.

In Austria it is 2.4 %. More specifically, if related to the occupied population, the HORECA share varies between 6 % (Spain) and 2 % (DK), giving a first indication of the employment potential of the tourism industry. The latter evaluation is paralleled by the value added share of HORECA, which similarly ranges from between as little as 1 % and more than 6 %. Again, the larger traditional tourist countries (France, Italy) show rather moderate outcomes whereas Spain and other, smaller touristic countries rank highest. Concerning EFTA the ratios are around 3.5% in Austria and Switzerland, and much smaller in the other (non-touristic) countries.

Unfortunately, similar EEA-wide macro evaluations for the other sections closely related to tourism are for reasons of data not feasible[7).

Concerning international tourism, more directly relevant information which shows the importance of this tourism segment is available. The NA provide for information on receipts of private households; in the BOP one may find an even broader scope (including business travel)[8). In the EU the PHFCE portion of touristic demand comes up to 4 or more percent of the final national consumption (or GDP) in the smaller touristic countries, and is around 2 % in all others. Within EFTA, Austria shows the highest percentage throughout (8.2 %), followed by Switzerland (6.6 %), whereas all other countries show low figures. This is an overall evaluation, giving only an approximation on the amount of GDP generated by foreign tourism, first because important indicators are included in other types of consumption, and on the other hand because of the non-consideration of indirect effects. Relative importance as a source of demand becomes even more obvious, when the ratio is related to the PHFCE. The result for the EU is, that foreign tourism easily reaches a size of 5 to 6 % and may account for up to 8 % of national household consumption. In the EFTA, Austria and Switzerland show even more dramatic shares, with a ration of about 15 %, respectively 12 % of the PHCE.

The relative importance of such demand shares becomes even more plausible on regional level.

It is well known that tourism has strong seasonality patterns. The portion of final demand may be immense in the peak season, and go through deep slumps during the low season.

Generally speaking it may be concluded, that restricted by the current availability of macro-information on tourism, some important illustrations can be given. This is, however, still a far from complete and conclusive presentation. Considerable progress is being achieved in Europe with regard to current reporting systems, further developments which now underway are to be encouraged in order to achieve a really comprehensive description of scope, multiple effects, regional and temporary impact etc. in economic terms.

3.3 Factors Working on the European Tourism Market

There are many factors working on the European tourism market not covered by macro-indicators. However, some of these features may still be tentatively broached, namely price levels, "quality", the inflow from extra-European origins and the net BOP balance.

3.3.1 Price levels

As well known, price levels have developed in the European Union quite differently, but most of the main tourism countries have experienced overproportional price increases, with only France being close to the average (basis: Consumer Price Index 1991 and 1980)[9). This does not mean that

7) Special studies of this type are underway under the auspices of the OECD (cp. Manual on Tourism Economic Accounts ; OECD; Paris 1991).

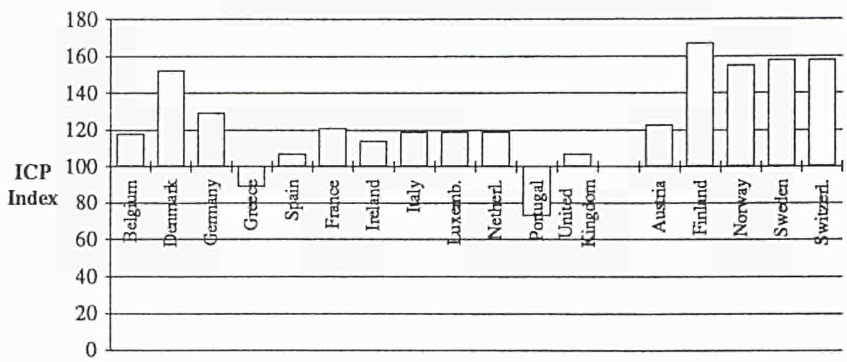
8) Excluding the transport subaccount, which is often not presented separately.

9) Generally the price levels of specific tourist uses like hotel & restaurant expenditure is above

tourism is cocausal for such a development, which is strikingly demonstrated by Austria and Switzerland, both remaining far below the overall averages. Excessive price levels must continuously (or from time to time) be adjusted to avoid undesirable effects on foreign markets. This situation is reflected in the ecu exchange rates, which went through a strong upward adjustment in Greece and Portugal and a moderate upward adjustment in Spain, Italy, France and the UK. Though, there were two countries in the EU, which adjusted downward (F and NL). In the EFTA, downward adjustments were more frequent than upward adjustments and even the latter were rather moderate.

Within the framework of the International Comparison Project (ICP; or European Comparison Programme: ECP) a new tool has been developed to compare price levels between countries. The aim is to confine purchasing power parity (PPP - the information related to the market directly) and the exchange rate (ecu base; related to the currency(ies) to be exchanged). That way one may have an idea[10] about the relative purchasing power (dis)advantage a tourist faces spending a certain amount either at home or abroad. In relation with partner countries the price level related to the ecu is giving some information[11]. Particularly high price levels are found in the Scandinavian countries and in Switzerland, whereas elsewhere values come close to the average (i.e. the ecu exchange rate). Price levels below this are found in Greece and Portugal only.

PRICE LEVELS (1991) ACCORDING TO THE INTERNATIONAL COMPARISON PROJECT (ICP)



Source: Eurostat, United Nations

3.3.2 Accommodation quality

In a broad sense factors of quality are linked to tourist motivation, and therefore none of them are easily understood in statistical terms, e.g. attractions of landscape, cultural heritage, social climate etc. One particular feature of tourist decision making is the quality of hotel accommodation. In Non-EEA countries the so called star classification system is well established, though not easily comparable between countries. However, some conclusions can still be drawn, which may be interesting enough and presumably representative for the whole area[12]. A clear "macro-shift" can be shown from lower to higher ranks. This shift is directed towards the medium class, whether measured in terms of establishments or bed places. In principle, this tendency towards higher quality should result in higher "per unit yields" and seem to signal the right way.

average CPI, but standardisation of the latter subindices is still poor.

10) Unfortunately, a specific tourism PPP is not available so that e.g. the overall or the PHFC PPP may be used.

11) If ecu based figures of two countries are related to each other, the ecu denominator falls away, resulting in the direct ratio of the relative price levels of the countries.

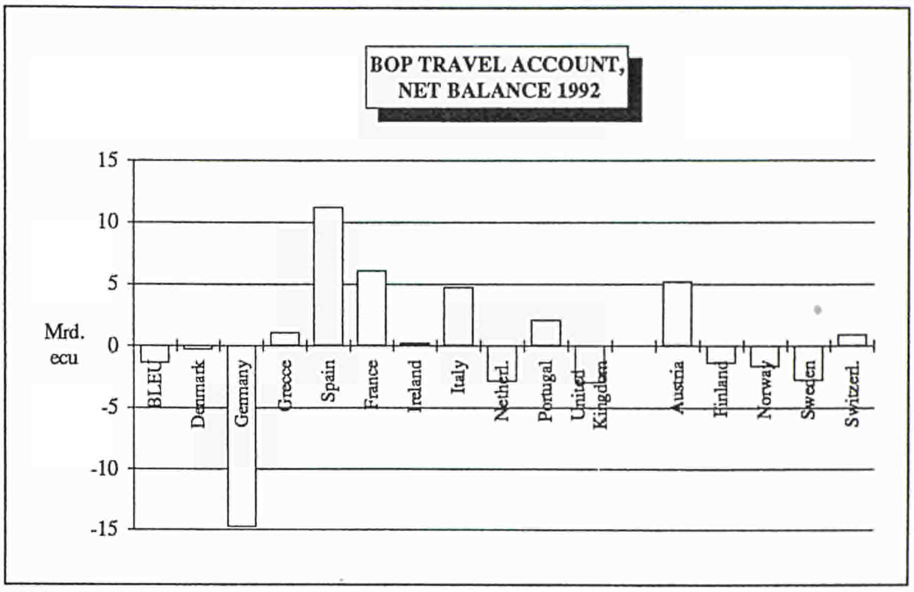
12) Figures are available for GR, E, F, IRL, I, P, and A.

3.3.3 Extra EEA origin

The European tourism market is comprised of tourists on holidays in their own country, in another EEA country, and tourists from other regions of the world.

Travelling patterns for non-EEA-residents are quite different from average non-residents as a whole (among which non-EEA residents still account for one fourth). The UK alone attracts more than half (53%) of the non-EEA-travellers. Relative attractiveness of a country like France is similar within and outside the EEA. Significant lower attractiveness turns out for Spain and Italy; the level of attractiveness for Germany is quite similar. In the EFTA, Switzerland and Sweden show a relatively high level of attractiveness. Taking the group as a whole, OECD overseas travellers are most important (about 2/3 of the total). Overseas travellers in the EU seem to be about equally distributed between users of hotels and other accommodation facilities, whereas in the EFTA hotels are the preferred accommodation type[13]. The economically interesting question who, on the average, are the big spenders, brings us to the next section.

13) No appropriate data available for the UK.



Source: Eurostat, OECD

3.3.4 Net balance in travel

Travel abroad affects the BOP of the countries in general, and in certain cases quite significantly. For economic policies the net result of credits (receipts) and debits (expenditure) is crucial.

In most cases this situation is rather clear-cut, vs. either a "chronical" surplus or deficit. In the EU the greatest deficit is shown by Germany, followed by the Netherlands and the UK (almost at par). Also the BLEU is showing a permanent deficit. In the EFTA the Scandinavian countries show a permanent excess expenditure.

The biggest surplus in the EU is regularly produced by Spain; in the EFTA it is produced by Austria. Important surpluses are also recorded for France and Italy. In these surplus countries the net travel balance covers about 50 % of the overall trade deficit in Spain, and about 85 % in Austria. Interestingly, the overall net balance of the EEA was never in the negative range during the reference period.

Also tourism related passenger transport is playing a role; the amounts are generally much smaller and the balances almost negligible.

PART II

Tourism in Europe - country reports for member states of the EU and EFTA

General Situation and Key Indicators: Development and Impact of Tourism

The economic importance of Belgium's tourism industry, which contributes an estimated 6.2% to the gross national product, is similar to that of its neighbouring countries.

Although the number of domestic tourists clearly exceeds that of inbound visitors, Belgium remains an important destination for tourists mainly from the neighbouring countries (The Netherlands, Germany, France, and to some extent the United Kingdom).

The country's varied landscape offers a range of touristic features. The northern part of the country (Flandre) is mainly made up of flatlands. The coast has several well known seaside resorts and the historical cities of Bruges and Ghent attract a large number of international visitors. The southern part of Belgium (Wallonie) has undergone pronounced structural changes following the closure of the old coal and steel industries. The mountainous landscape has still retained some of its rural character. The densely forested Ardennes mountains offer excellent spots for hiking and outdoor recreation.

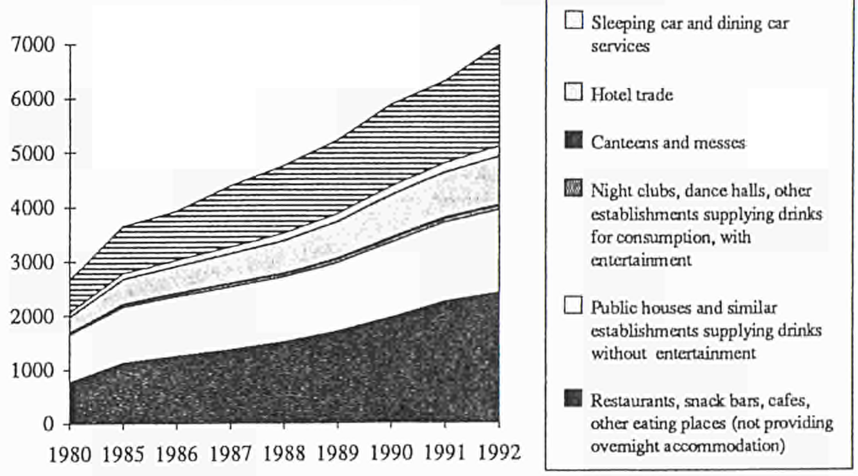
Brussels, the main urban centre, is located in the transition zone between the southern part of the country and the northern flat-

Travel (tourism) in the Balance of Payments (BLEU*)
(million ecus)

	1980	1985	1986	1987	1988	1989	1990	1991	1992	1993
with EUR 12										
Credit (travel)	911	1 296	1 521	1 998	2 164	1 906	2 162	2 291	3534	—
Debit (travel)	1 576	1 777	1 991	2 556	2 786	2 574	2 986	3 380	5457	—
Net (travel)	-665	-481	-470	-558	-622	-668	-824	-1 089	-1923	—
Net account for all economic sectors	187	-72	743	3 520	3 969	6 247	6 536	7 103	—	—
with Extra EUR 12										
Credit (travel)	394	902	723	720	760	837	808	645	890	—
Debit (travel)	788	933	977	952	1 175	1 345	1 257	1 119	1659	—
Net (travel)	-394	-31	-254	-232	-415	-508	-449	-474	-769	—
Net account for all economic sectors	-2 488	-208	1 019	-501	-699	-1 981	-2 243	-2 862	—	—
with world										
Credit (travel)	1 305	2 198	2 244	2 718	2 924	2 743	2 970	2 936	4 424	3 464
Debit (travel)	2 365	2 710	2 968	3 508	3 961	3 919	4 243	4 499	7 116	5 365
Net (travel)	-1 060	-512	-724	-790	-1 037	-1 176	-1 273	-1 563	-2 692	-1 901
Net account for all economic sectors	-3 547	-280	1 762	3 019	3 270	4 266	4 293	4 241	—	—

*BLEU: Belgo Luxembourg Economic Union

Total turnover (HORECA/TA), Mio. ecus



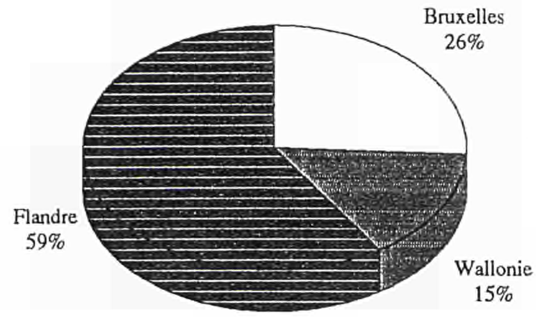
lands. It is the economic and cultural centre of the country and a common destination for urban tourism. As the seat of several major international organizations (eg, European Commission, NATO), Brussels attracts a large number of business travellers.

Balance of payments data are only available for the Belgo Luxembourg Economic Union (BLEU). But as Belgium forms the dominant part of the BLEU, the figures provide a reliable insight into the Belgian situation.

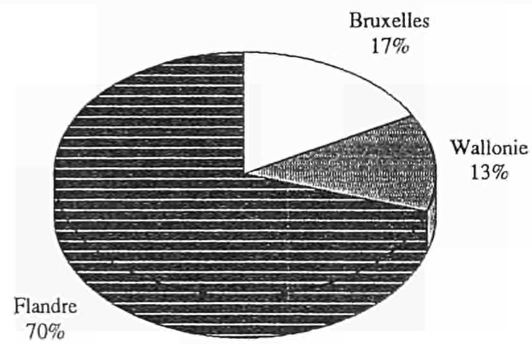
The travel (tourism) balance clearly indicates that expenditure by Belgian tourists abroad exceeds receipts from inbound tourists. The increasingly negative trend in the net travel balance since 1985 was checked in 1993. The net balance has been more negative with countries of the European Union (EU) than with non-EU countries. However, payment flows with non-EU countries have stagnated since the mid-1980s, while debit and credit flows within the EU have developed steadily except for a slight downturn in 1989.

The hotels, restaurants, cafés, and travel agencies sector provides reliable information on the tourism industry. Turnover has constantly increased since the 1980s. Growth rates were highest in 1990 and 1992. Turnover in 1992 reached ECU 7000 million, almost double the 1985 figure (approximately ECU 3700 million). The main contributors are restaurants and travel agencies, followed by establishments

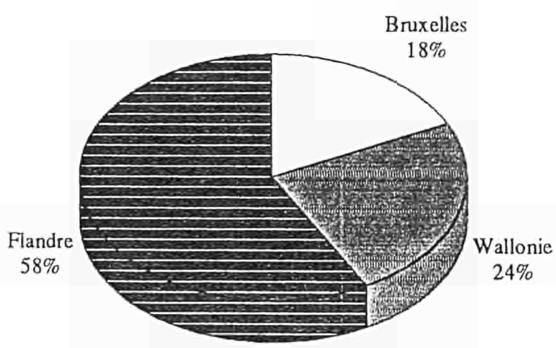
Turnover by tourism related industries by region (1991)



Investment by tourism related industries by region (1991)



Employment by tourism related industries by region (1991)



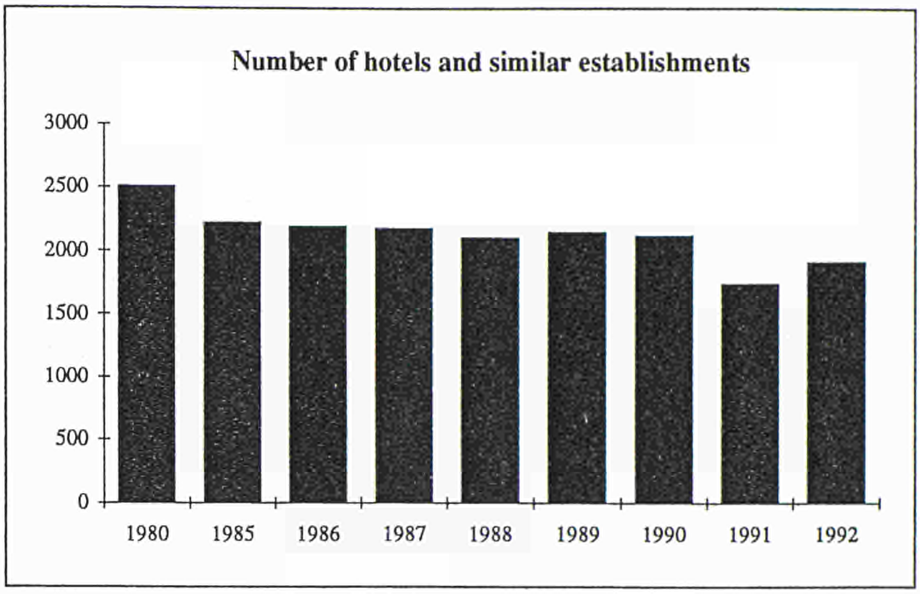
supplying drinks and the hotel industry.

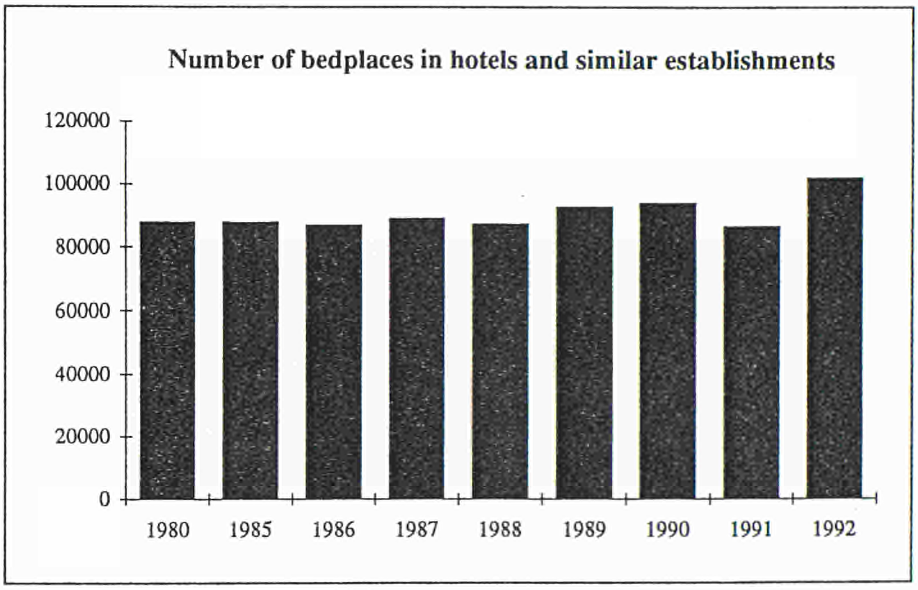
Proportions of individual contributions have remained the same over the years.

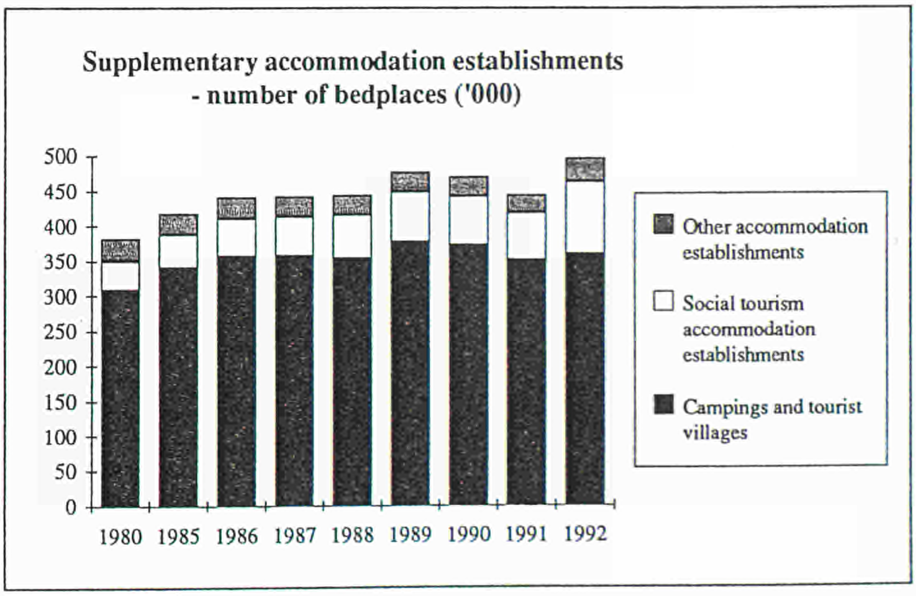
A careful comparison of tourism-related investment, turnover, and employment in the three main regions (Flandre, Wallonie, Brussels) gives a reliable idea of tourism activity, although financial and employment figures do not have the same statistical basis. The importance of Flandre is indicated by its share in tourism-related turnover (59%), employment (about 59%), and investments (70%). Turnover and investment in Brussels is higher than in Wallonie, while employment is significantly lower. The employment-intensive tourism industry plays a more important role in regions with structural problems, such as Wallonie.

Tourism Supply

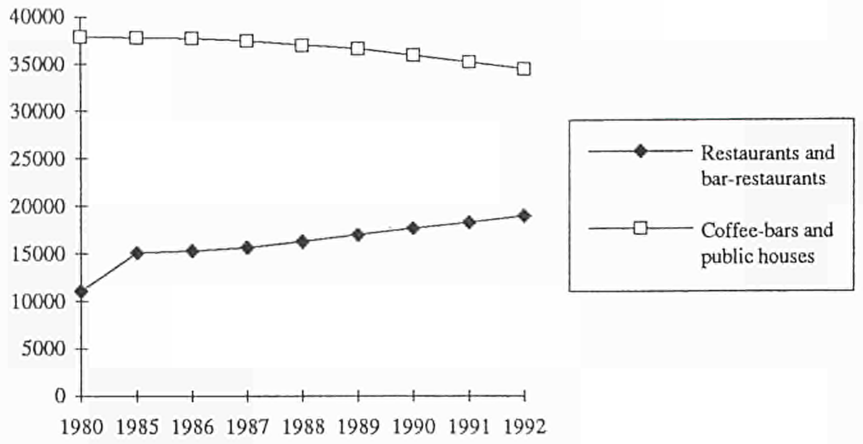
Two contrasting trends can be observed in accommodation supply. Stagnation in the number of hotels and similar establishments during the second half of the 1980s was followed by a downward trend in the early 1990s. In contrast, the number of bedplaces grew steadily and in 1992 it exceeded 100 000 for the first time. The year 1991 was an exception, however, because of the sharp fall in the number of establishments and bedplaces. The fall can be attributed to the Gulf crisis, as approximately 5% of all inbound visitors come from the



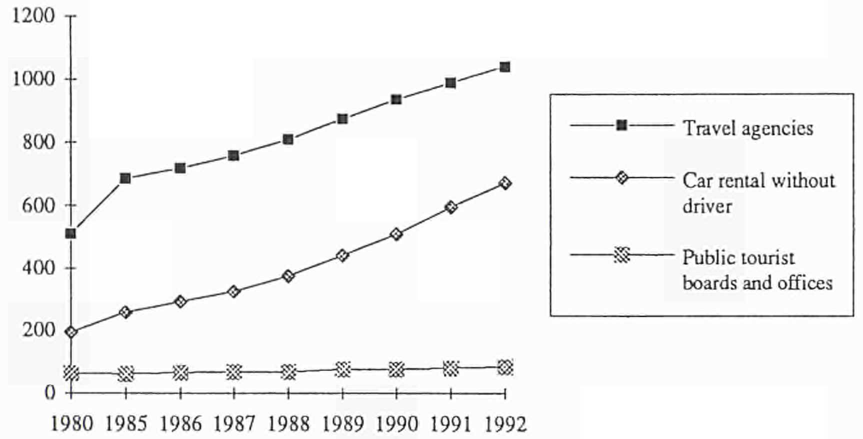




Other tourist activities - number of establishments



Other tourist activities - number of establishments



United States and hotel enterprises in Belgium responded to low demand by keeping segments of their businesses closed. The decrease in the number of establishments compared with the number of bedplaces suggests a trend towards concentration, similar to developments in many other European countries.

The large number of campsites and tourist villages are a typical feature of the Belgian tourism industry. Until 1991 they accounted for more than half of the supplementary accommodation establishments and approximately 80% of the bedplaces. Their dominance has decreased since 1992 (70% of bedplaces) with the rise in the number of social and other accommodation establishments. Supplementary accommodations experienced the same slump as hotels and similar establishments in 1991, presumably for the same reasons.

All other tourist activities (restaurants and bar restaurants, car rental without driver, travel agencies, public tourist boards and offices) developed steadily except for coffee-bars and public houses, which have declined slightly but steadily since 1985. The largest number of establishments are those serving food or beverages.

Transport data reflect a general increase in infrastructure supply and passenger demand.

Air transport had the highest growth rates. Between 1985 and 1990 the number of plane movements increased by 86% and the number of passengers by 42%. After 1990 the growth rate for plane movements slowed down although it continued to rise for the number of passengers. The Gulf crisis affected passenger traffic in 1991 as the number fell by 3%. But recovery (+19%) was rapid in 1992.

Passenger kilometres by rail have increased since 1986, although the total for 1992 (6798 million km) did not reach the 1990 level (6963 million km). The number of passengers has remained almost the same since 1985, but the length of lines has been reduced.

Road transport grew at a moderate rate. But there was a clear decline in the number of buses and coaches.

Tourism Demand

The total number of nights in accommodation establishments declined steeply in 1991 and 1992. Although low demand in 1991 can be attributed to the Gulf crisis, the even more striking decrease in 1992 is more difficult to explain. Hotels and similar establishments were the only type of accommodation with constant growth rates, while holiday dwellings, campsites, and tourist villages recorded a significant downturn.

Until 1990 demand for tourism accommodation by residents (22 million nights) was almost double that by nonresidents (12 million nights). The situation changed appreciably by 1992, when nonresident demand remained at around 12 million overnights but resident demand fell lower than 15 million overnights. Decrease in overnights for all accommodation establishments is clearly due to loss of resident demand.

The main difference in accommodation preference between residents and nonresidents is that nonresidents tend to stay in hotels and similar establishments (60% of overnights in 1992), while residents have a slight preference for campsites and tourist villages. Nonresident demand was sensitive to the Gulf crisis as the corresponding number of overnights fell in 1991.

Transport infrastructure

Railways

	1980	1985	1986	1987	1988	1989	1990	1991	1992
Length of lines (km)	3 978	3 712	3 691	3 639	3 554	3 513	3 479	3 466	3 432
Passengers carried (Mio.)	164	150	139	142	143	142	142	146	146
Passenger-km (Mio)	6 963	6 572	6 069	6 270	6 348	6 400	6 539	6 770	6 798

Road

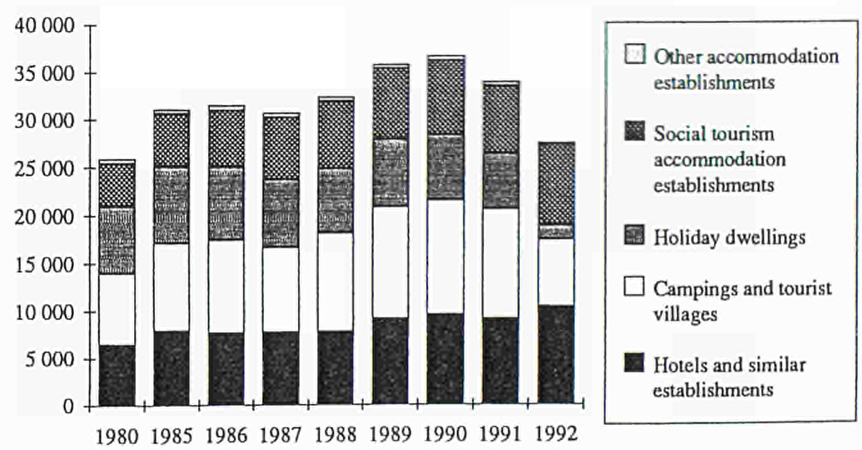
	1980	1985	1986	1987	1988	1989	1990	1991	1992
Motorways (km)	1 252	1 534	1 549	1 568	1 613	1 613	1 613	—	—
Stock of buses and coaches	19 560	16 817	16 449	16 095	15 811	15 831	15 644	15 378	15 261
Cars (1000)	3 159	3 343	3 409	3 498	3 614	3 737	3 864	3 970	4 021
Cars per 1000 inhabitants	321	339	346	354	365	377	397	398	399

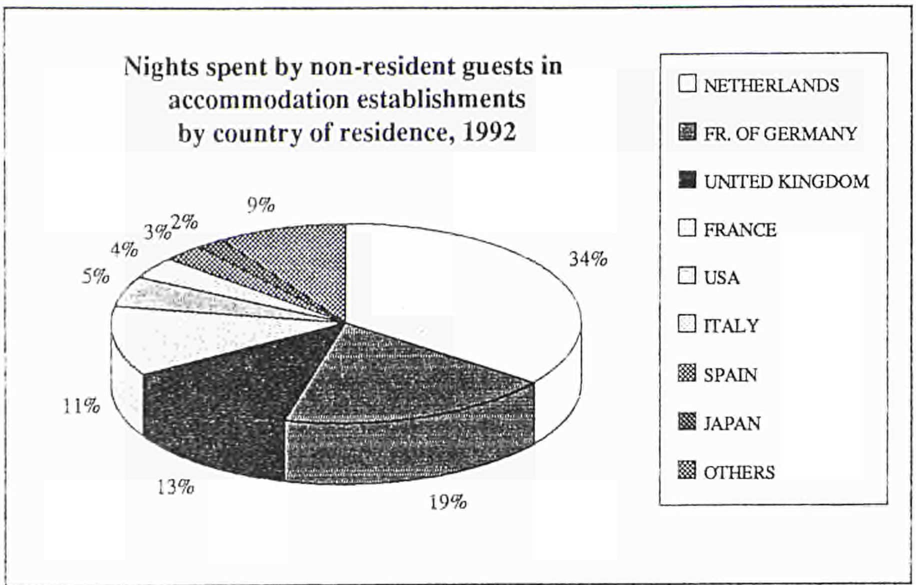
Aviation

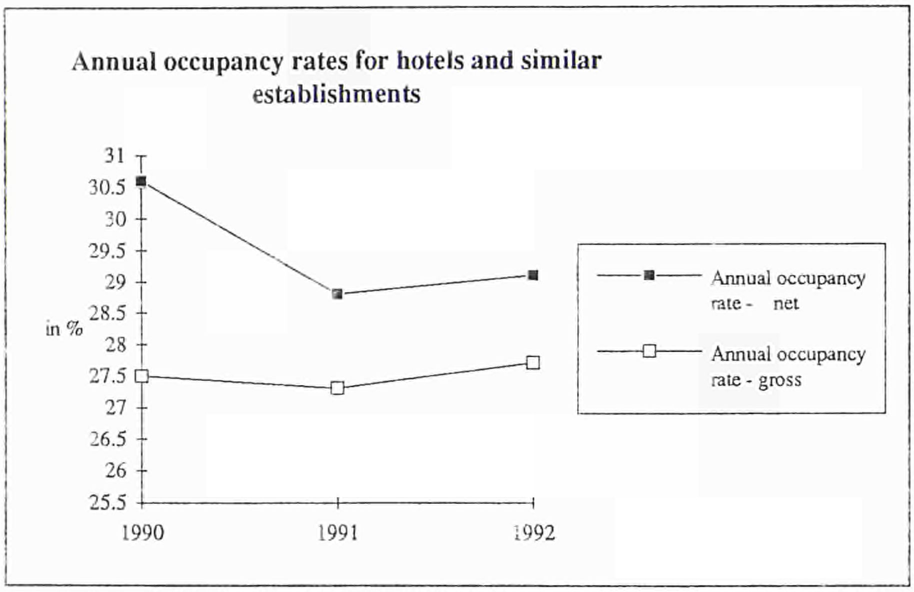
	1980	1985	1986	1987	1988	1989	1990	1991	1992
Aircraft movements (1000)	100	104	105	112	157	182	193	190	191(1)
Total passengers (1000)	5 270	6 027	6 122	6 643	7 434	7 485	8 549	8 341	9919(1)

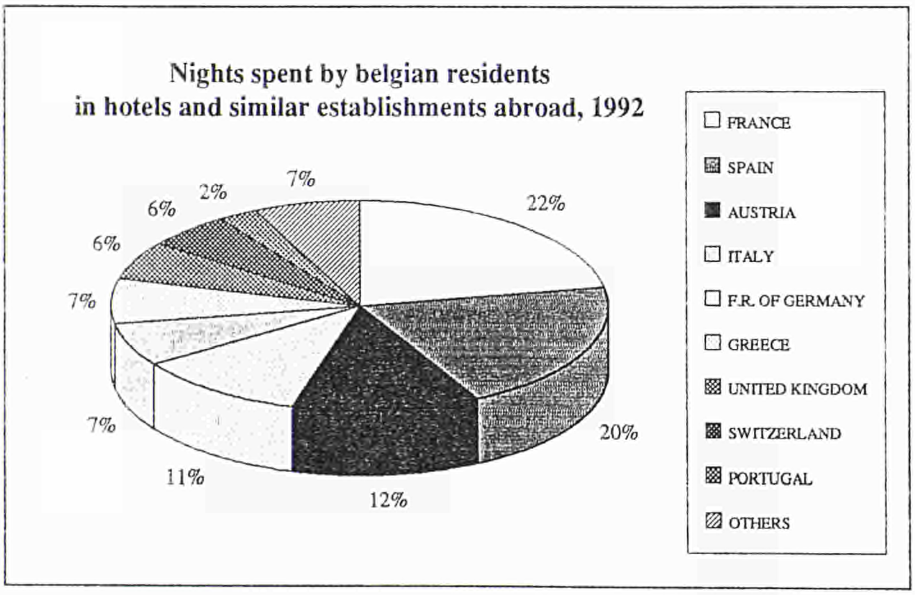
(1) Estimation, based on data for Bruxelles airport

Nights spent in accommodation establishments ('000)









Inbound tourists mainly come from neighbouring countries. The Netherlands, Germany, the United Kingdom, and France account for approximately 77% of all visitors. Other European countries (Italy and Spain) are also important. The United States (5%) and Japan (2%) also have significant shares considering the distance.

Occupancy rates data similar to those from other European countries have only been available in Belgium since 1990. The Gulf crisis slump of 1991 is clearly visible. The negative impact of the crisis was stronger on net rates than on gross rates, although this contradicts the assumption that suppliers may have responded to low demand by keeping parts of their establishments temporarily closed.

The two main destinations abroad for Belgian tourists are France and Spain, which account for 43% of nights spent by Belgian residents in hotels and similar establishments abroad. France is preferred because of its proximity, while Spain is a popular destination for package tours. Austria and Italy rank next with 23% of nights spent abroad. The third group comprises Germany, Greece, the United Kingdom, and Switzerland, each of which has a share of 6-7%.

General Situation and Key Indicators: Development and Impact of Tourism

Denmark is an attractive maritime country between the Scandinavian peninsula and mainland Europe. Domestic, inbound, and outbound tourism is strongly influenced by the geographic features.

Inbound tourism to Denmark increased steadily during the 1980s. Tourists mainly come from Germany, the Scandinavian countries, and the United States. Denmark traditionally receives more tourists from countries outside the European Union (EU), although the difference between EU and non-EU countries was reduced considerably towards 1992. For example, the negative balance with Germany during the late 1980s has tilted in Denmark's favour since 1991 because of the increasing number of German tourists.

Growth in outbound tourism to southern Europe outpaced that of inbound tourism in the late 1980s and resulted in a negative travel balance (ECU –419 million in 1988). Since then, inbound tourism has increased more than outbound tourism. The travel balance was positive (ECU 274 million) in 1991, for the first time since 1985.

Gross value-added of lodging and catering services was ECU 1258 million in 1990. It represented about 3% of all market services (ECU 43 287 million). The corresponding percentage in southern Europe is much higher (eg, 6% in Portugal).

Lodging and catering services are labour-intensive. Persons occupied in the tourism accommodation sector totalled 18 282 in 1992, compared with 56 397 in restaurants and bars, and 4621 in travel agencies.

Hotels do not account for the largest share in the number of overnights. But they generate the highest turnover and employment because they benefit from higher tourist expenditure (eg, business travellers), compared with other modes of accommodation.

Travel (tourism) in the Balance of Payments
(million ecus)

	1980	1985	1988	1989	1990	1991	1992
with EUR 12							
Credit (travel)	497	731	834	859	1 026	1 147	1 276
Debit (travel)	685	1 018	1 520	1 546	1 536	1 390	1 348
Net (travel)	-188	-287	-686	-687	-510	-243	-72
Net account for all economic sectors	-6 203	-4 028	-2 839	-2 217	-865	61	...
with Extra EUR 12							
Credit (travel)	465	1 021	1 217	1 240	1 590	1 664	1 649
Debit (travel)	437	712	950	927	1 153	1 147	1 365
Net (travel)	28	309	267	313	437	517	284
Net account for all economic sectors	712	636	1 742	1 146	1 854	1 670	...
with world							
Credit (travel)	962	1 752	2 051	2 099	2 616	2 811	2 925
Debit (travel)	1 122	1 730	2 470	2 473	2 689	2 537	2 713
Net (travel)	-160	22	-419	-374	-73	274	212
Net account for all economic sectors	-5 820	-3 392	-1 097	-1 071	989	1 731	...

Tourism Supply

Ranking of accommodation types in Denmark differs from that in other EU countries. The most important types in central and southern Europe are hotels and similar establishments, while owned summerhouses rank highest among holiday dwellings in the northern countries (Sweden, Finland and Norway).

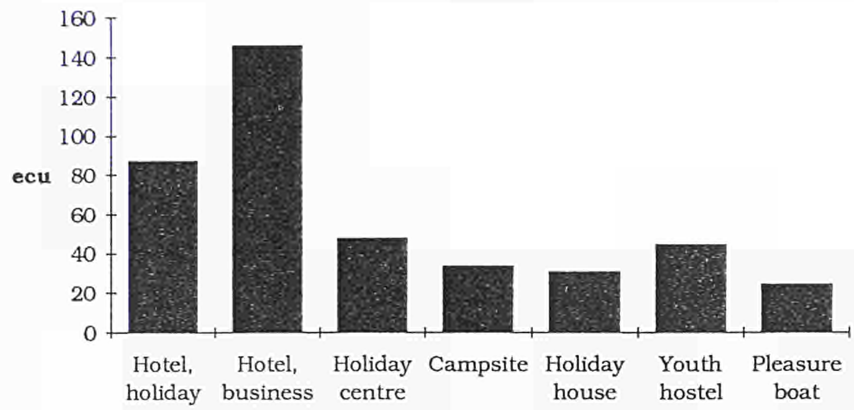
In Denmark, as in other northern countries, bungalow-type dwellings are the most important type of accommodation. They may be used by the owner (average about 15 weeks/year), in which case they are classified as second homes, but they may also be rented out to other people and statistically classified as holiday houses. In 1990, there were 184 155 such summerhouses in Denmark.

Capacity of campsites, also an important accommodation type, was 246 000 bedplaces in 1992. In Denmark, a pitch at a campsite is counted as 3 bedplaces.

Pleasure ports (277 in 1992) are also an important mode of holiday accommodation in Denmark.

Hotels in Denmark also include similar establishments. The threshold for including hotels in official statistics was raised from 10 bedplaces to 40 bedplaces in 1989. The number of establishments—which is an inadequate measure of capacity—thus decreased radically from 945 to 531. The change of threshold level did not affect bedplace availability as the number increased from 83 973 (1988) to 85 014 (1989). Although the number of bedplaces increased, that of rooms decreased from 36 498 (1988) to 34 092 (1989), which means that the average number of bedplaces per room increased from 2.30 to 2.49.

Average daily per capita expenditure by type of accommodation, 1992



Estimated tourism turnover and tourism employment by type of accommodation, 1992

	Overnight stays ('000)	%	Turnover attributed to tourism (million ecus)	%	Employment attributed to tourism (persons)	%
Hotels/holiday	3 468	4	357	9	8 052	10
Hotels/business	5 012	5	800	20	18 305	23
Holiday centres	3 967	4	213	5	4 557	6
Campings	14 182	15	493	12	9 599	12
Holiday houses, rented	21 915	23	756	19	9 399	12
Youth hostels	1 048	1	45	1	934	1
Boating harbours	1 778	2	44	1	839	1
Farmhouses	120	0	4	0	96	0
Friend/relative visits	28 017	29	1 004	25	21 542	27
Second homes	15 810	17	348	9	6 625	8
Total	**95 318**	**100**	**4 064**	**100**	**79 948**	**100**
Same-day visitors (non-residents)	-	-	561	-	10229	-
Transport (estimated part of non-local)	-	-	705	-	15800	-
Total	-	-	**5330**	-	**105977**	-

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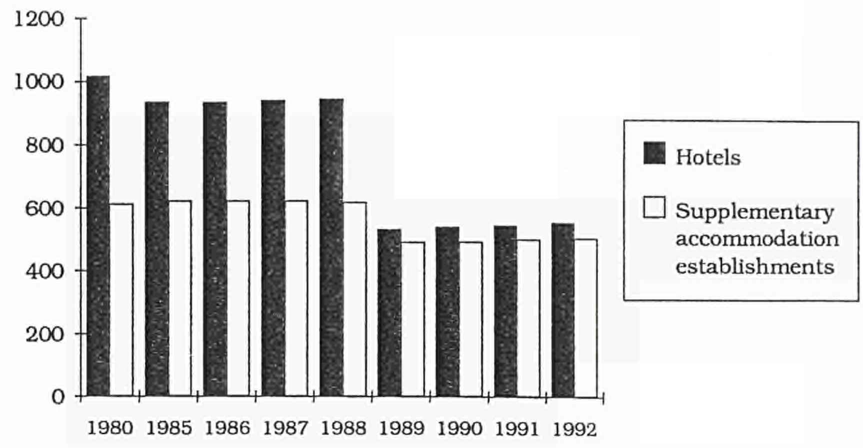
Number of accommodation establishments



Transport infrastructure (*)

	1980	1985	1988	1989	1990	1991	1992
Railways							
Length of lines (km)	2 461	2 471	2 476	2 344	2 344	2 329	2 306
Passengers carried (Mio.)	130	132	140	140	145	145	143
Passenger-km (Mio.)	3 803	4 508	4 726	4 649	4 851	4 711	4 600
Road							
Motorways (km)	504	593	593	601	635	665	695
Stock of buses and coaches	7 351	8 010	8 093	8 031	8 109	9 403	11 261
Cars (1000)	1 390	1 501	1 596	1 598	1 590	1 592	1 596
Cars per 1000 inhabitants	271	293	311	311	309	309	309
	1980	**1985**	**1988**	**1989**	**1990**	**1991**	**1992**
Aircraft movements - all (1000)	965	902	1 016	1 012	1 014	...	...
Total passengers (1000)	9 404	10 182	...	...	...	...	...

The number of passengers and passenger kilometres for rail transport increased steadily up to 1990. After 1990 the length of the railway lines started to decrease and as did the number of passengers in 1992.

The number of passenger cars and buses increased until 1987, after which it has remained at the same level. Construction of motorways progressed at a moderate rate.

Tourism demand(*)

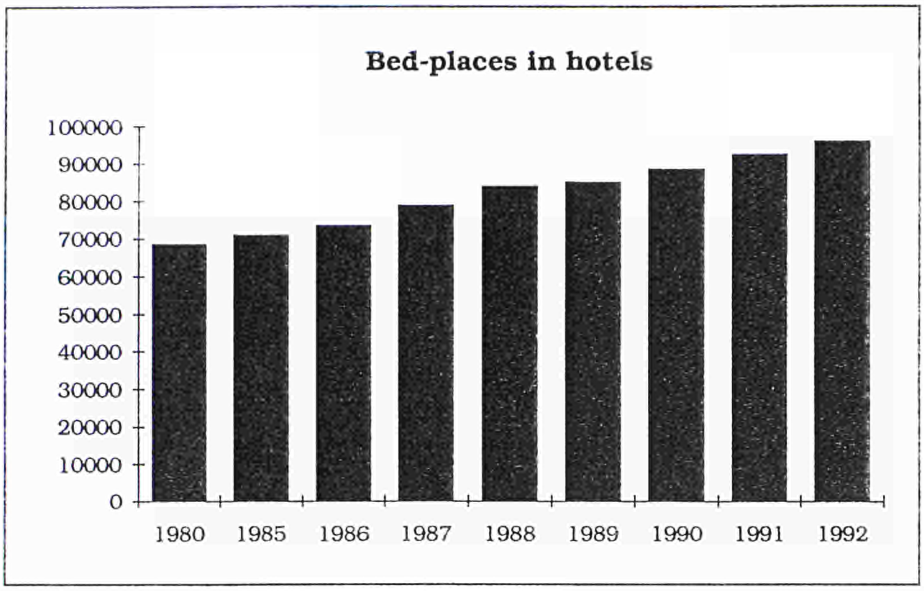
In the late 1980s, accommodation capacity grew more rapidly than demand. The result was that the gross occupancy rate for hotel bedplaces, which was 38% in 1985, declined to 32% in 1988. (Danish statistics include the gross occupancy rate rather than the net occupancy rate.) Subsequent improvement in the supply and demand balance raised the gross occupancy rate to 35% in 1992.

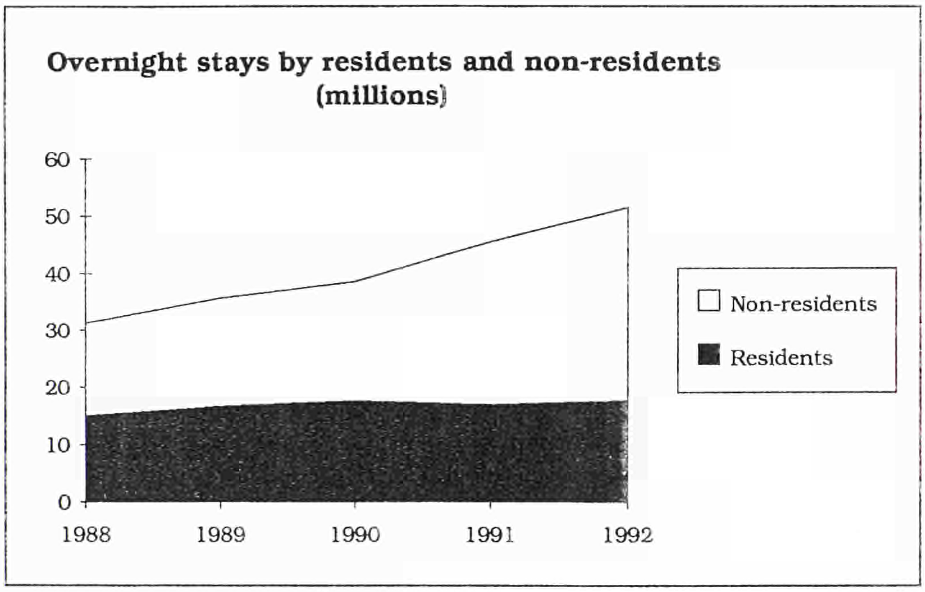
The large seasonal variation is better highlighted by the gross occupancy rate than the net occupancy rate. In 1992, the occupancy rate was lowest (18%) in December and January. Occupancy increases towards the summer and peaks in July (67% in 1992); it then tapers off towards winter.

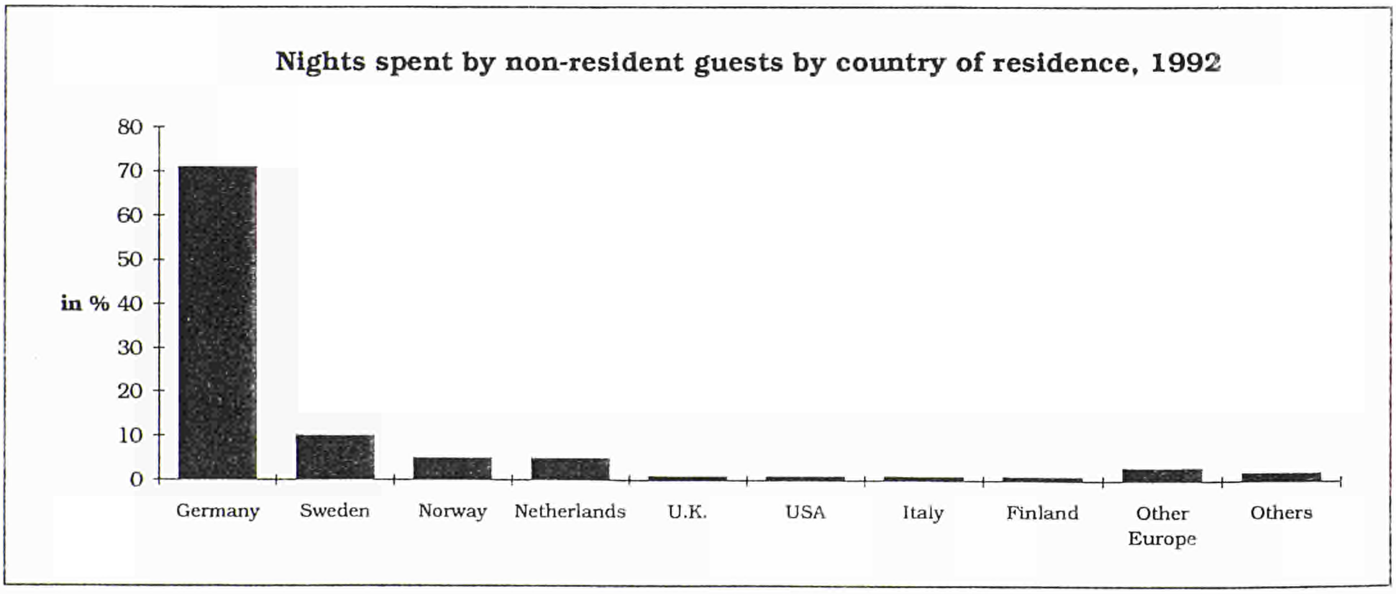
(*) Figures presented in the tables include estimates for those accommodation establishments, which are not inluded in accommodation statistics

Demand for tourism accommodation improved for all types between 1988 and 1992. The most remarkable feature was that demand for holiday houses more than doubled during the 5-year period. Holiday houses are used mostly by Germans (85 %). They are normally owned privately; owners may have more than one such house. Residents and nonresidents have an almost equal share in the demand for other modes of accommodation. Holiday villages, consisting of several cottages, are included in holiday centres; they also did well during the 5-year period.

Data on nonresident tourism refer to nationality rather than country of residence, but the difference in the case of Denmark is quite small. At present, only 10 nationalities are distinguished in accommodation statistics and only up to 4 nationalities for statistics on holiday houses and pleasure ports. Inbound tourism is quite concentrated. German, Swedish, Norwegian, and Dutch tourists to-







gether account for 92% of overnights; Germans alone represent 71%.

In 1972, 51% of the Danish population over 15 years made at least one holiday trip lasting 5 days or more. The proportion rose to 68% in 1987 and it has remained at the same level since then. People now tend to make more holiday trips. The percentage of people who made two holiday trips rose from 13% in 1987 to 17% in 1992, and that of people with three or more holiday trips increased from 5% to 7%.

Growth in travel by Danish residents involved domestic travel (from 34% in 1987 to 40% in 1992) rather than outbound travel. The most popular domestic destination in 1992 was northern Jutland (19% of all domestic trips). Jutland is preferred by those making a single trip; its popularity decreases in favour of central Zealand as the number of trips increases.

Destinations of outbound trips vary. The 10 most favoured destinations account for less than two-thirds of outbound trips by Danish residents. France has the highest preference but its share of all outbound trips was only 13% in 1992. Spain ranked second with 9%, and Norway third with 8%.

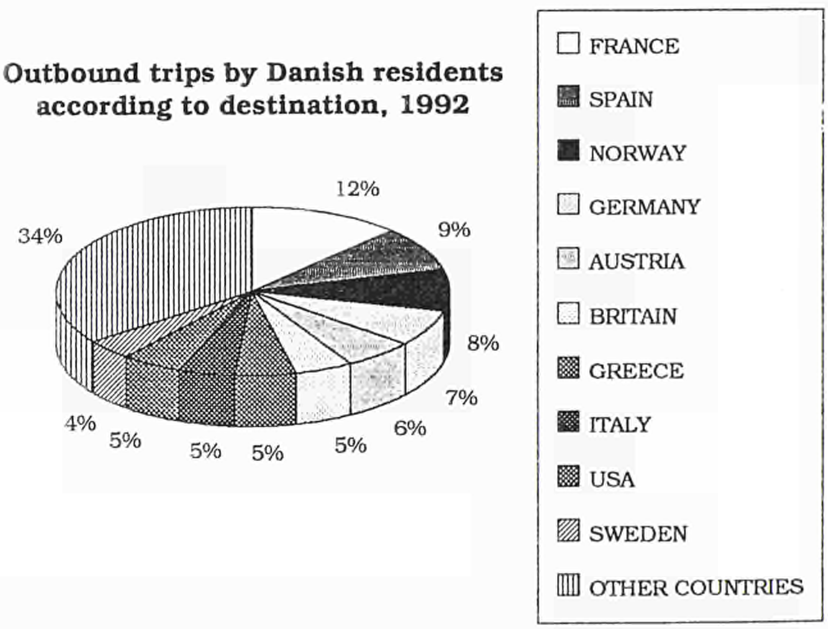
Domestic and outbound trips by Danish residents ('000)

	1987	1990	1992
Total trips	3 766	4 045	4 037
Domestic	1 302	1 515	1 622
Outbound	2 464	2 530	2 415

Nights spent in accommodation establishments, 1988-1992 ('000)

	1988	1989	1990	1991	1992	Change in % 1988/92
Hotels	6 609	7 624	7 988	8 298	8 480	28
Holiday centres	2 424	2 939	3 447	3 798	3 967	64
Campsites	10 416	11 313	11 946	12 548	14 182	36
Holiday houses	9 373	11 256	12 653	18 234	21 815	134
Youth hostels	876	949	991	1 045	1 048	20
Boating harbours	1 624	1 624	1 624	1 624	1 778	9
Total	**31 323**	**35 705**	**38 649**	**45 547**	**51 371**	**64**

Outbound trips by Danish residents according to destination, 1992



Nights spent by country of residence and type of accommodation, 1992 ('000)

	Total	Hotels	Holiday centres	Campsites	Holiday houses	Youth hostels	Boating harbours
Total	51 371	8 481	3 967	14 182	21 915	1 048	1 778
Denmark	17 564	3 814	2 067	8 812	1 512	521	838
Germany	24 133	756	1 084	2 962	18 601	96	634
Sweden	3 534	1 410	399	765	571	181	210
Norway	1 858	571	274	309	641	63	...
Netherlands	1 527	155	80	917	358	17	...
U.K.	403	309	28	50	...	17	...
USA	334	310	4	6	...	14	...
Italy	246	165	2	60	...	19	...
Finland	207	108	3	78	...	18	...
France	167	81	5	68	...	12	...
Japan	113	113	0	...	...	...	...
Other Europe	846	315	17	124	233	60	97
Other countries	439	374	4	31	...	31	...

General Situation and Key Indicators: Development and Impact of Tourism

Statistics for Germany should be interpreted carefully as they sometimes concern only western Germany. The five new *Länder* (Mecklenburg-Vorpommern, Brandenburg, Sachsen, Sachsen-Anhalt, Thüringen) were not included in tourism data series until mid- 1991.

The tourism industry, particularly lodging and catering services, developed substantially during the second half of the 1980s through the early 1990s. Overall turnover for lodging and catering services, which is calculated on a biannual basis, has risen steadily. Above-average growth was observed particularly between 1988 (DM 63 439 million) and 1990 (DM 74 394 million). Significant increases were also recorded for gross value-added volume; the 1991 volume index was 124.4, compared with 108.9 for 1989 (1985 = 100). The number of persons engaged in these services also rose significantly (873 000 in 1989; 1.1 million in 1991).

The travel (tourism) account is generally negative in Germany's balance of payments because outbound tourism prevails over inbound tourism. This applies to the balance with countries both within and outside the European Union (EU). The continuously negative balance reflects the widening gap between expenditure by German residents abroad and receipts from inbound tourists in Germany. Moreover, outbound travel showed no sign of abatement despite a slowing of the economy in 1989 and the subsequent recessionary trend.

Lodging and catering services maintained their share of 3% in gross value-added of market services during 1984–1992. The percentage of persons engaged in these services also remained at a high level (8.6%).

Travel (tourism) in the Balance of Payments
(million ecus)

	1980	1985	1986	1987	1988	1989	1990	1991	1992	1993
with EUR 12										
Credit (travel)	1 884	2 735	3 107	3 325	3 512	3 802	4 123	4 217	4199	—
Debit (travel)	6 595	8 969	9 621	10 569	11 084	11 034	11 765	13 049	13913	—
Net (travel)	-4 712	-6 234	-6 514	-7 244	-7 572	-7 231	-7 642	-8 832	-9 714	—
Net account for all economic sectors	-4 901	-681	10 953	16 034	21 924	32 253	19 468	-5 095	—	—
with Extra EUR 12										
Credit (travel)	1 655	3 544	3 315	3 337	3 641	3 975	4 275	4 139	4 219	—
Debit (travel)	5 872	7 969	8 745	9 678	10 111	10 437	11 480	11 904	14523	—
Net (travel)	-4 217	-4 426	-5 430	-6 341	-6 470	-6 461	-7 205	-7 766	-10304	—
Net account for all economic sectors	-5 708	20 821	27 029	23 012	18 931	19 903	17 643	-10 948	—	—
with world										
Credit (travel)	3 539	6 278	6 422	6 663	7 153	7 778	8 397	8 356	8 419	8 974
Debit (travel)	12 468	16 938	18 366	20 247	21 196	21 471	23 245	24 954	28 436	32 041
Net (travel)	-8 929	-10 660	-11 944	-13 584	-14 043	-13 694	-14 847	-16 598	-20 017	-23 067
Net account for all economic sectors	-10 609	20 140	37 983	39 046	40 855	52 156	37 112	-16 043	—	—

Tourism Supply

During 1988–1991 hotels and similar establishments increased their capacity (number of bed-places), but their number remained the same. Figures for 1992 show a sudden rise because they include data from the new *Länder*.

Supplementary accommodation establishments (tourist villages, holiday dwellings, social tourism accommodation establishments, other accommodation establishments) developed slightly, but steadily, throughout 1985–1993.

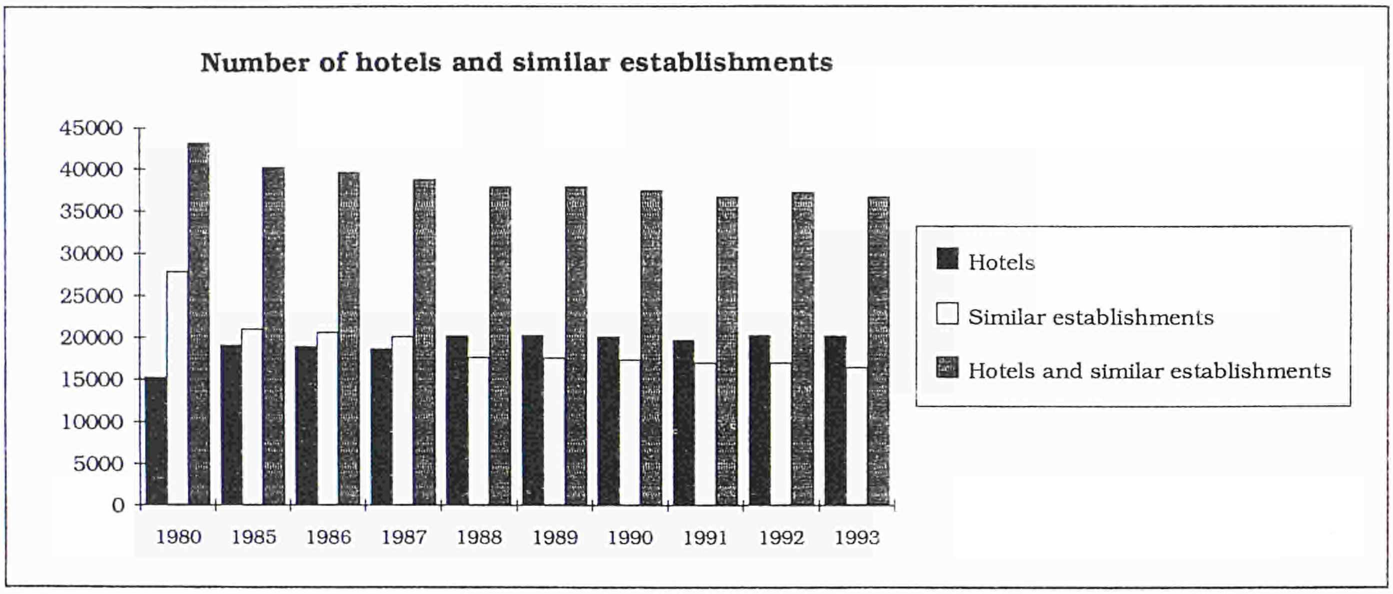
Nonaccommodation tourism-related enterprises also developed steadily, except coffee bars and public houses.

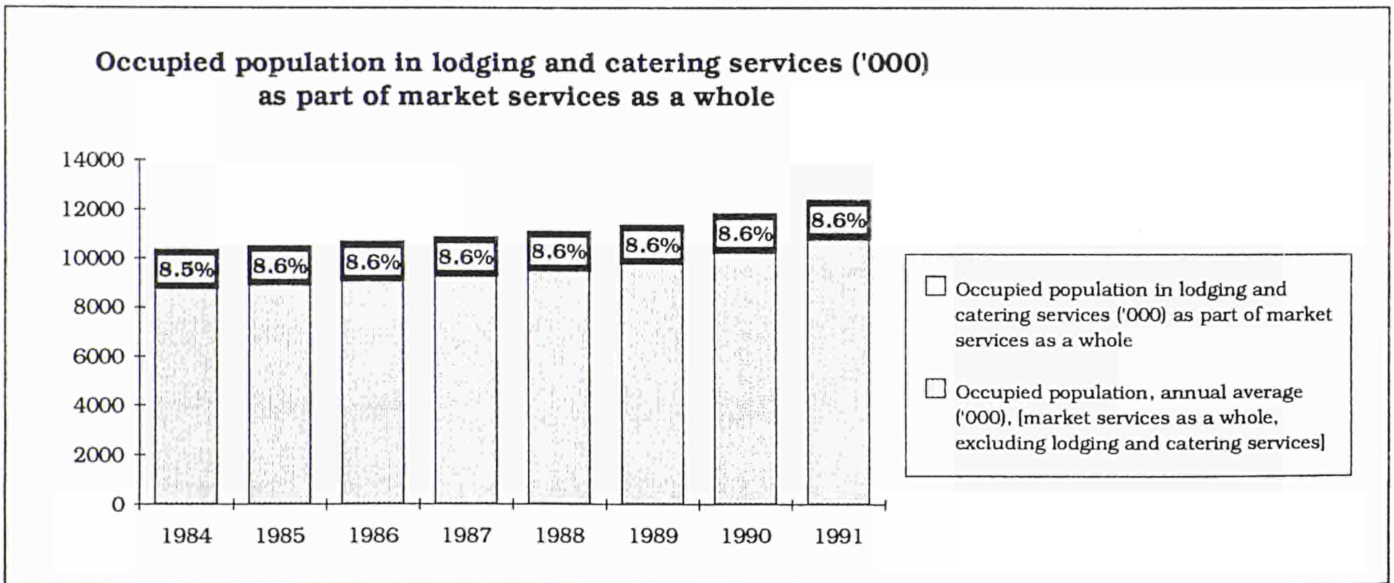
Plane movements and air passengers increased by approximately 60% and 70%, respectively, between 1985 and 1992. Road transport also showed an upward trend. Until 1990 railway passenger traffic and length of lines showed no improvement. Since 1991, however, passenger kilometers have increased. Two intercity express (ICE) lines were opened to launch the high-speed train system, which is expected to increase rail passenger traffic in the medium term.

Tourism Demand

Tourism demand data are derived from local surveys (inbound tourism) and statistics from tourist destination countries (outbound tourism).

Most types of accommodation establishments recorded a clear increase in overnights, except tourist villages, campsites, and social tourism accommodations, which showed only moderate improvement.





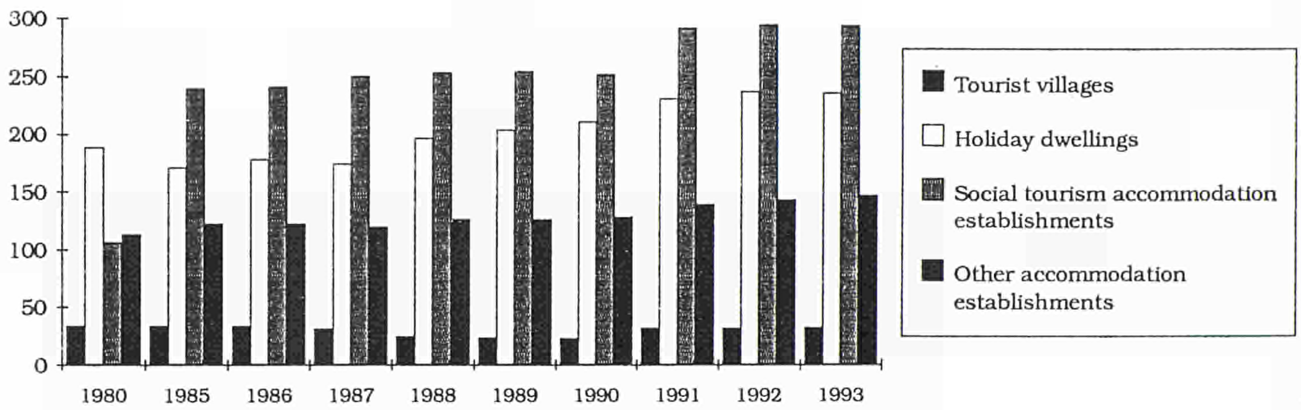
Net occupancy rate data are available only for hotels and similar establishments. The rates have shown an upward trend since 1985. The data also reveal a typical seasonal pattern of high summer rates and low winter rates (November–January).

The difference between resident and nonresident demand for tourism accommodation is mainly based on that for holiday dwellings and "other accommodation establishments". In these cases resident demand continued to grow until 1992, while nonresident demand stagnated in 1991 and 1992.

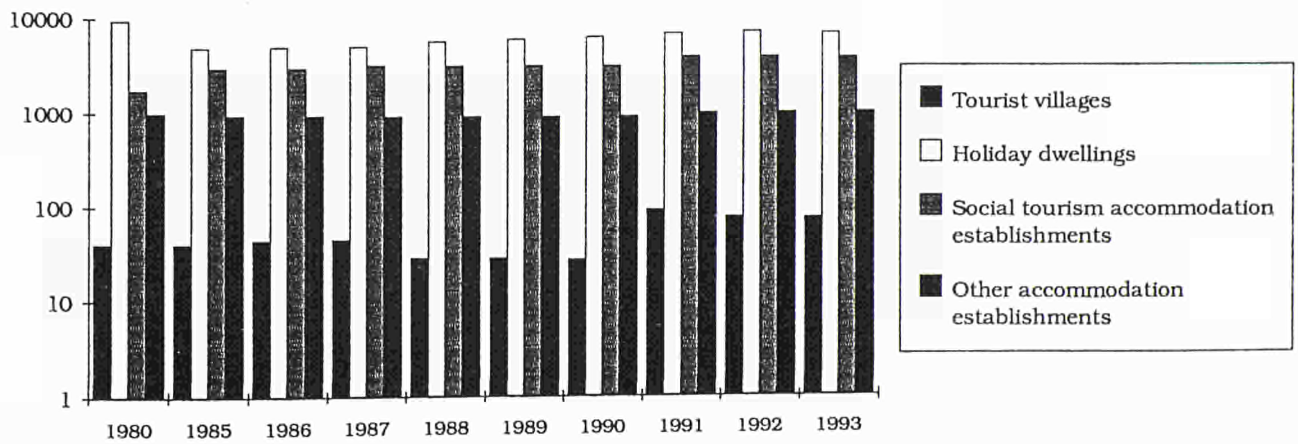
Tourism accommodation enterprises in Germany rely more on resident demand than in other European countries. The share of nonresident demand in total overnights during 1985–1992 was 14%, which reflects the relatively low rate of inbound tourism.

Based on the total number of overnights, The Netherlands, the United States, and the United Kingdom account for a high percentage of inbound tourists. The main international markets for supplementary accommodation establishments are The Netherlands and Denmark because of geographic proximity and the tendency of tourists from these countries to prefer tourist villages and holiday dwellings.

Number of bedplaces in supplementary accommodation establishments ('000)



Number of supplementary accommodation establishments



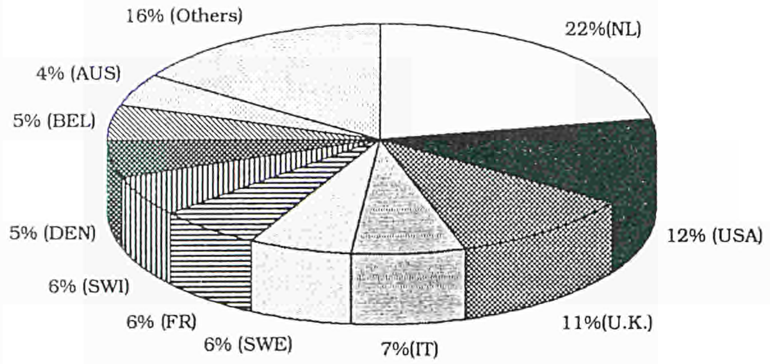
As the total number of border arrivals is calculated from small statistical samples, the variable should be interpreted carefully.

There was little change in the number of border arrivals. The same trend was observed for arrivals from both EU and non-EU countries. While arrivals by road and rail stagnated or slowed down, those by air grew steadily and significantly.

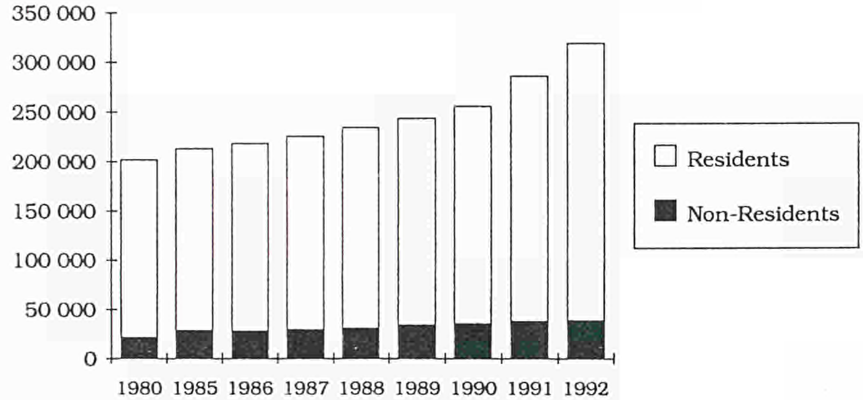
Despite stagnating border arrivals, overall tourism receipts from inbound visitors increased steadily. Duration of stay was also longer because the number of overnights increased slightly.
Germany, with its high average per capita income and "wanderlust", traditionally generates a large share of the demand for travel and tourism on the international market.

Data on outbound tourism is based on the number of nights spent by German residents in hotels and similar establishments in other countries. The most popular destinations for Germans are Austria (approximately 25 million overnights in 1992), and the typical Mediterranean holiday resorts in Italy (24 million in 1991) and Spain (27 million in 1992). Other preferred destinations are neighbouring countries France, Switzerland, The Netherlands, and Denmark, and Mediterranean countries Portugal and Greece.

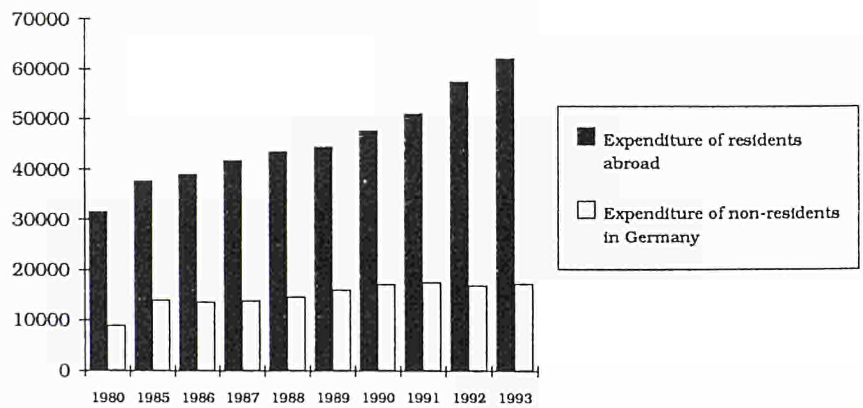
Nights spent by non-residents by country of residence, 1992



Nights spent by residents/non-residents in accommodation establishments ('000)



Global tourist expenditure (in Mio. national currency)



Tourism expenditure by German residents continued to rise despite economic problems. It rose from DM 51 thousand million in 1991 to almost DM 63 thousand million in 1993. Annual growth in expenditure averaged 3–6% between 1985 and 1991.

Transport infrastructure (*)

Railways (**)

	1980	1985	1986	1987	1988	1989	1990	1991	1992
Length of lines (km)	28 517	27 634	27 490	27 427	27 284	27 045	26 949	27 079	27180
Passengers carried (Mio.)	1 105	1 048	1 023	994	1 026	1 027	1 043	1 070	1096
Passenger-km (Mio.)	38 353	42 707	41 397	39 174	40 959	41 144	43 560	45 639	46407

Road

	1980	1985	1986	1987	1988	1989	1990	1991	1992
Motorways (km)	7 538	8 350	8 437	8 618	8 721	8 822	8 959	9 050	9123
Stock of buses and coaches	70 350	69 207	69 325	70 037	70 186	70 478	70 370	69 550	69917
Cars (1000)	23 192	25 845	26 917	27 908	28 878	29 755	30 685	31 322	32006
Cars per 1000 inhabitants	405	455	473	489	504	514	495	500	504

Aviation

	1980	1985	1986	1987	1988	1989	1990	1991	1992
Aircraft movements - all (1000)	901	1 441	1 545	1 744	1 898	2 118	2 173	2 255	2312
Total passengers (1000)	49 003	55 580	57 059	64 546	68 834	73 003	80 647	85 320	93910

General situation and key indicators: Development and impact of tourism

Greece is a classic destination for tourists. The sharp rise of its tourism sector since the early stages in the 1950s has been driven mainly by the promotion of package holidays. In addition, Greece's tourism portfolio consists of a wide range of recreational schemes such as tours to ancient sites, cultural events, and, recently, business tours.

Evaluation of the sector's performance is not confined to statistics on tourist arrivals and holiday nights. The significance of the sector to the national economy warrants an assessment in economic terms based on data supplied by all agents in the public and private sectors. As a key component in the country's balance of payments, tourism is actively promoted to increase foreign exchange earnings and to improve the invisible components of the balance of payments.

During 1980-1993 the increase in tourist arrivals was matched by that in tourism receipts, which almost doubled from ECU 1 231 million in 1980 to ECU 2 460 million in 1992. Although tourist arrivals declined by about 10% in 1991 due to the Gulf war, receipts maintained their 1990 level. Average annual growth of tourism receipts between 1980 and 1992 was 8%. However, per capita tourist expenditure did not keep pace with the steady growth in arrivals and receipts. Since 1980 change in disposable personal income of inbound tourists has fluctuated between an annual decrease of 16% (1989/90) and an annual increase of 11.5% (1990/91); average annual growth has been 0.4%.

The Greek economy is marked by a chronic and steadily growing merchandise trade deficit. Although tourism receipts do not entirely cover the deficit, they compensate for a larger part of the merchandise trade loss (from 21.8% in 1990 to 58% in 1992).

An analysis of the gross domestic product (GDP) reveals that domestic tourist expenditure (money spent by Greek residents on tourism) is 5-10 times higher than inbound tourist expenditure. In 1992 tourism represented 10% of total GDP, compared with 8.5% and 8% for Spain and Portugal, respectively. According to

Travel (tourism) in the Balance of Payments
(million ecus)

	1980	1985	1986	1987	1988	1989	1990	1991	1992	1993
with EUR 12										
Credit (travel)	624	891	829	925	933	874	938	1 011	—	—
Debit (travel)	152	352	349	281	421	505	609	354	—	—
Net (travel)	472	539	480	644	512	369	329	657	—	—
Net account for all economic sectors	-1 717	-3 220	-839	-132	144	—	—	—	—	—
with Extra EUR 12										
Credit (travel)	607	957	1 008	1 052	1 137	945	1 071	1 121	—	—
Debit (travel)	69	126	151	156	202	234	245	464	—	—
Net (travel)	538	831	857	896	935	711	826	657	—	—
Net account for all economic sectors	-1 412	-2 451	-881	-1 023	-897	—	—	—	—	—
with world										
Credit (travel)	1 231	1 848	1 837	1 977	2 070	1 814	2 004	2 132	2 460	2 757
Debit (travel)	221	478	500	437	623	739	854	818	911	862
Net (travel)	1 010	1 370	1 337	1 540	1 447	1 075	1 150	1 314	1 549	1 895
Net account for all economic sectors	-305	-768	42	891	1 041	—	—	—	—	—

these estimates, Greece ranks highest among the Mediterranean countries for tourism.

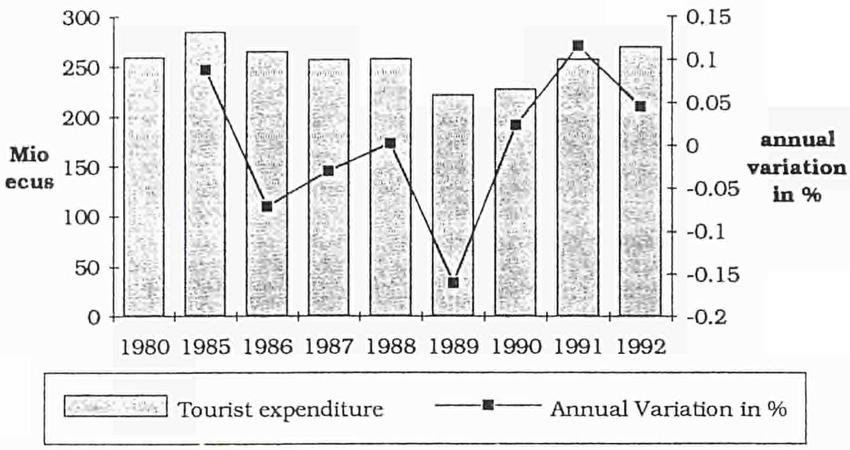
It is difficult to define accurate indicators for employment created directly and indirectly in the tourism sector, mainly because of the seasonal nature of a significant proportion of these jobs. The actual attributes of jobs in the tourism industry are a matter of debate. Nevertheless, an extrapolation based on total employment creation in lodging and catering services indicates that the share of tourism has risen to 11% in Greece.

As an export-oriented industry in Greece, tourism has a favourable impact on foreign exchange earnings and on the economy as a whole. Its high potential has incited the Greek government to actively encourage local and foreign investment in the tourism sector in the form of long-term loans or direct investments. In addition, regional funds have been allocated by the European Union (EU) for the construction and improvement of infrastructure (eg, marinas, conference centres, road network).

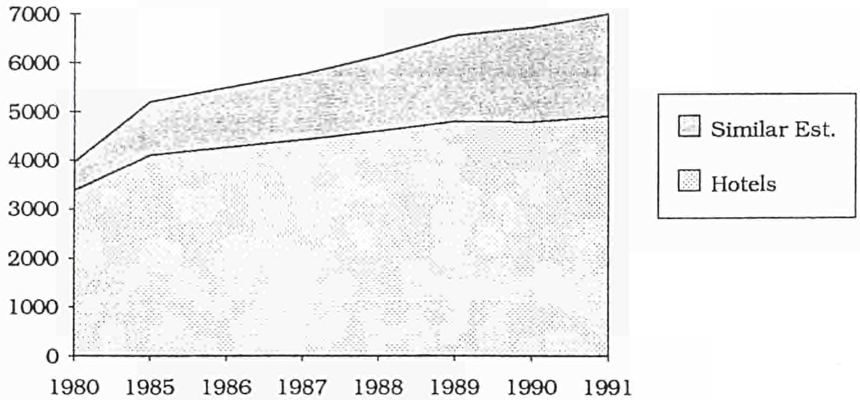
Tourism Supply

Providing accommodation to tourists is a major task of the tourist industry. The rise in the number of accommodation establishments and bedplaces has kept pace with growth in the tourism sector in Greece. Accommodation facilities and tour-

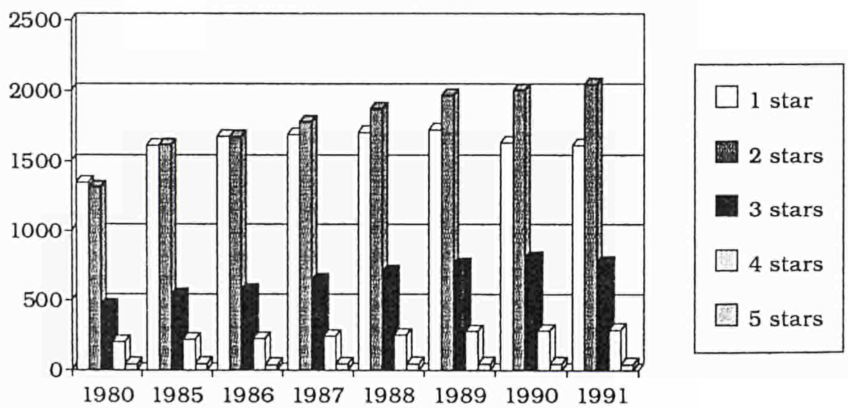
Per capita tourist expenditure



Number of hotels and similar establishments

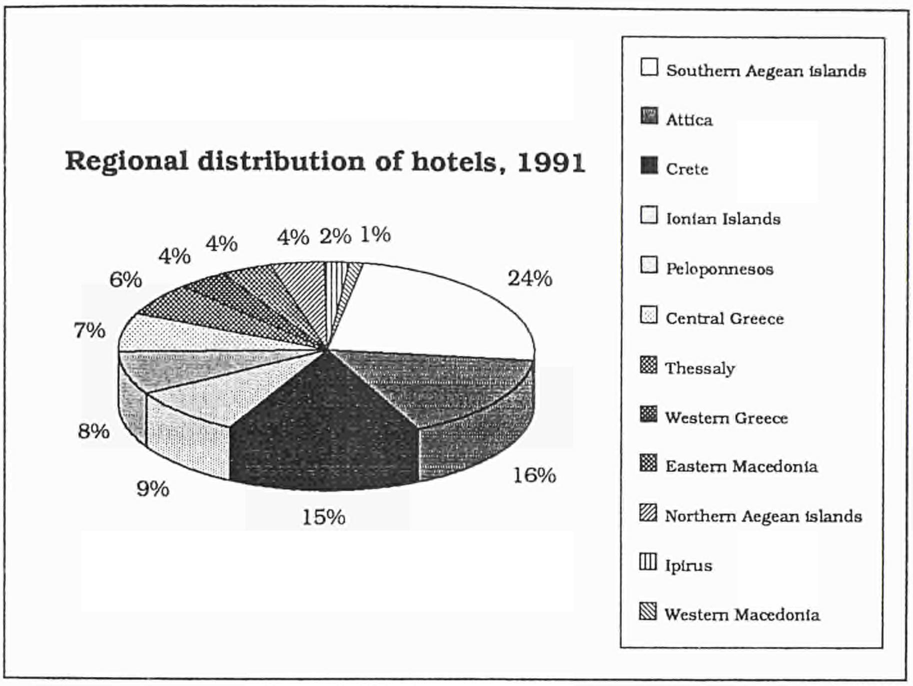


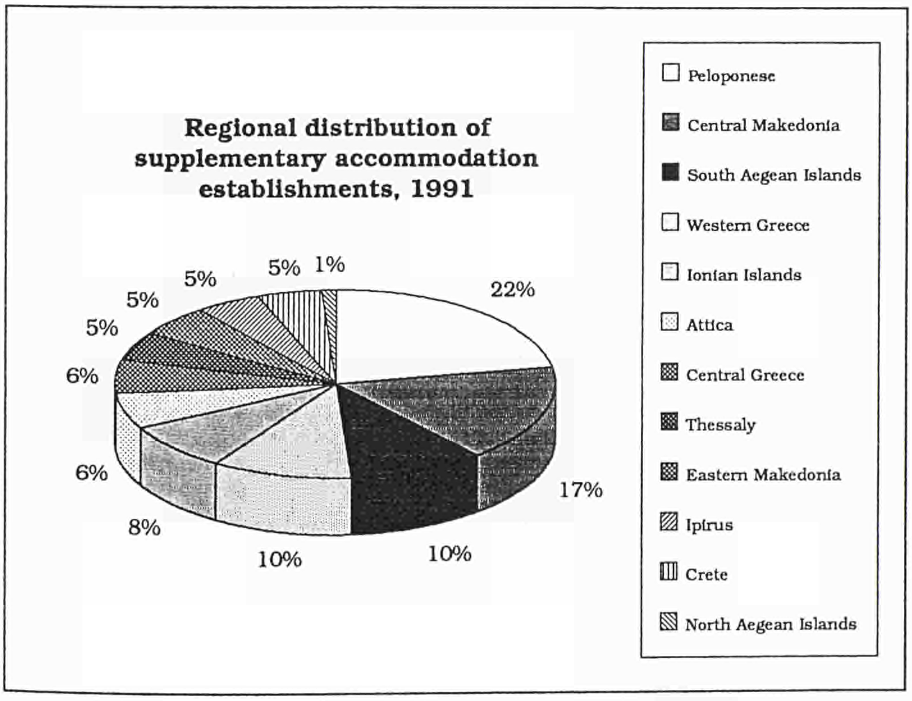
Number of hotels according to quality



ist infrastructure have improved considerably during the past decade, especially in large cities and on the islands.

These changes have affected all types of accommodation establishments. The number of hotels increased by an average annual rate of 4.8% from 3 373 in 1980 to 4 893 in 1991. Their growth was outstripped by the rise of 17.3% in the number of similar accommodation establishments. The total average increase of hotels and similar accommodation establishments was 7.4%. Bedplaces also increased-from 278 045 in 1980 to 459 297 in 1991.





One- and two-star hotels form the dominant categories. The number of one-star hotels fell towards the early 1990s. The highest growth rate was recorded, however, for three-star hotels. The number of four-star hotels also increased, while that of five-star hotels fell slightly.

Hotel capacity is concentrated at the main destinations: Rhodes, Corfu, Crete, and Greater Athens. In 1991 the Southern Aegean Islands accounted for 21.8% of total capacity; they were followed by Athens (14.1%) and Crete (13.8%).

Supplementary accommodation establishments such as campsites, holiday dwellings, social tourism establishments, and rented rooms grew rapidly in certain areas. In 1991 Peloponnese accounted for 22% of the total number of campsites and tourist villages, followed by Central Macedonia (17%) and the Southern Aegean Islands (10%). These types of accommodation are not as important in the main tourist areas (6.4% in Greater Athens; 5.2% in Crete).

Supplementary accommodation establishments are concentrated in regions where domestic tourism predominates. Approximately 90% of the clients of rented rooms are Greek. In 1990 the total number of bedplaces in authorized rented rooms was 282 304, whereas there were only 311 registered campsites.
The ratio of hotels to supplementary accommodation establishments in Greece is 1:0.76 com-

pared with 1:2 or 1:3 in other European tourist destinations. This does not, however, include the large number of unregistered, unauthorized rooms for rent in Greece.

Other tourist activities such as restaurants and cafés also recorded steady growth. These types of enterprises contribute substantially to revenue generated by tourism. In 1989 the number of registered restaurants and cafés was 71 223. The number of travel agencies increased from 1 688 in 1986 to 2 250 in 1989.

Transport infrastructure does not follow the same trend as the rest of tourism supply. Total length of motorways has grown only moderately and length of railway lines expanded marginally from 2 461 km in 1980 to 2 484 km in 1992.

Tourism Demand

Greece's assets such as its climate, physical environment, and archaeological and cultural heritage undoubtedly had a positive influence on the development of tourism in the country. Over the past 2 decades international tourist arrivals have recorded a massive increase, mostly due to the promotion of package holidays. The steady upward trend continued until the early 1990s when it was disrupted by the Gulf war (12.6% fall in 1991). Recovery, however, was rapid as the number of arrivals increased by 15.2% between 1991 and 1992.

Transport infrastructure

Railways

	1980	1985	1986	1987	1988	1989	1990	1991	1992
Length of lines (km)	2 461	2 461	2 461	2 479	2 479	2 479	2 484	2 484	2 484
Passengers carried (Mio.)	101	111	117	117	118	123	120	122	122
Passenger-km (Mio.)	1 464	1 732	1 950	1 973	1 963	2 011	1 977	1 995	2 046

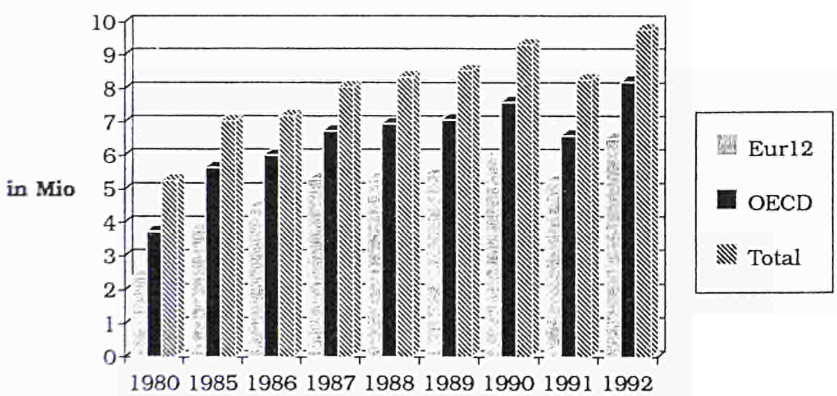
Road

	1980	1985	1986	1987	1988	1989	1990	1991	1992
Motorways (km)	1 923	2 117	2 154	2 276	2 344	2 424	2 558	2 597	2 660
Stock of buses and coaches	18 011	18 237	18 485	18 748	19 173	20 653	21 430	22 080	22 674
Cars (1000) (*)	863	1 263	1 359	1 433	1 498	1 605	1 735	1 777	1 829
Cars per 1000 inhabitants (**)	89	127	136	143	150	160	168	172	179

Aviation

	1980	1985	1986	1987	1988	1989	1990	1991	1992
Aircraft movements (1000)	178	231	231	239	241	245	245	—	—
Total passengers (1000)	16 433	23 079	21 782	22 862	22 927	23 508	22 974	—	—

Arrivals of visitors at the borders



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The number of foreign tourists rose from 5 million in 1980 to 9.5 million in 1992 (average annual increase of 7.1%).

Nights spent in hotels, similar accommodation establishments, and supplementary accommodation establishments totalled 49 million in 1992. Annual growth during 1980-1992 fluctuated between 14.5% and 0.1% (average growth 2.7%); the only exception was 1991 when overnights declined by 13% over the previous year for all types of accommodation establishments.

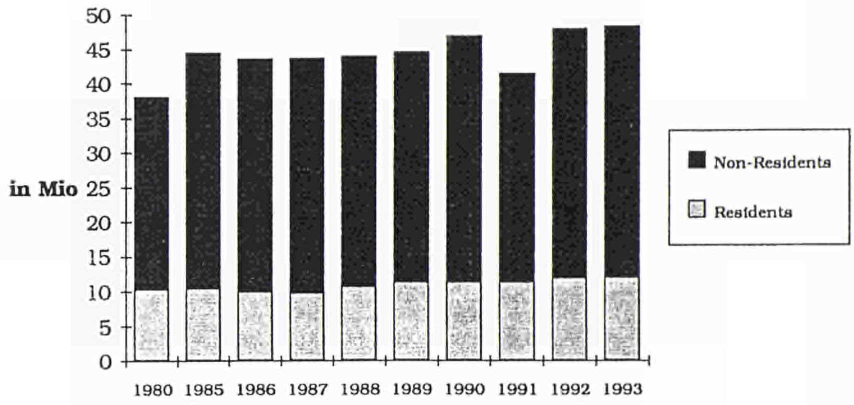
Nights spent in hotels and similar accommodation establishments by both residents and nonresidents have increased since 1980. Growth has been higher for nonresidents -from 38 million nights in 1980 to 48 million nights in 1993 (average growth 2.65%) - due to the nature of tourism in Greece.

Supplementary accommodation establishments recorded a decline in the number of nights because of increased supply from hotels and similar accommodation establishments. This shift was mainly driven by non residents who spent only 647 000 nights in supplementary accommodation establishments in 1992, compared with 1 665 245 nights in 1985; the fall was less steep for residents-from 793 808 nights in 1985 to 478 000 nights in 1992.

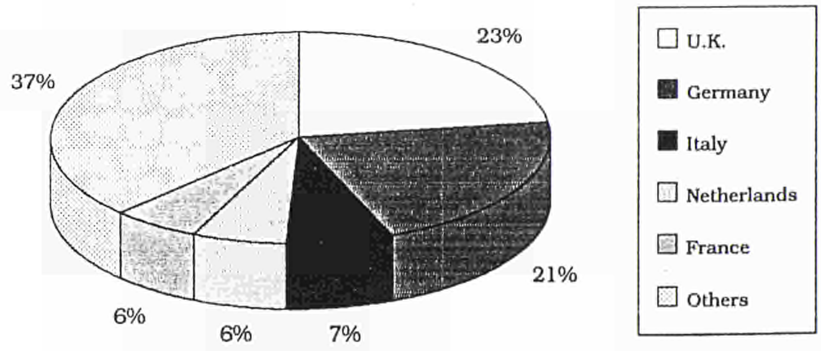
Tourists travelling to Greece mostly come from western Europe. Their share increased from 77.5% of foreign tourists in 1980 to 91.3% in 1992; 76.5% of the western European tourists in 1991 were from the EU. In the early 1980s, however, Scandinavians and residents of former Yugoslavia made up the majority of the European tourists; now they mainly come from the United Kingdom and Germany. In the 1980s Greece also received a relatively high proportion of tourists from the United States. This has changed lately as arrivals dropped from 321 081 in 1981 to 180 429 in 1991, although they climbed back to 278 941 in 1992.

Asian and African countries also increased their share but still account for a small proportion. Visitors from Japan represent an important proportion of those tourists who are interested in Greece's cultural and archaeological heritage. The Japanese market has developed rapidly after 1987; the average annual growth in arrivals during 1980-1991 was 47.2%.

Nights spent in all accommodation establishments



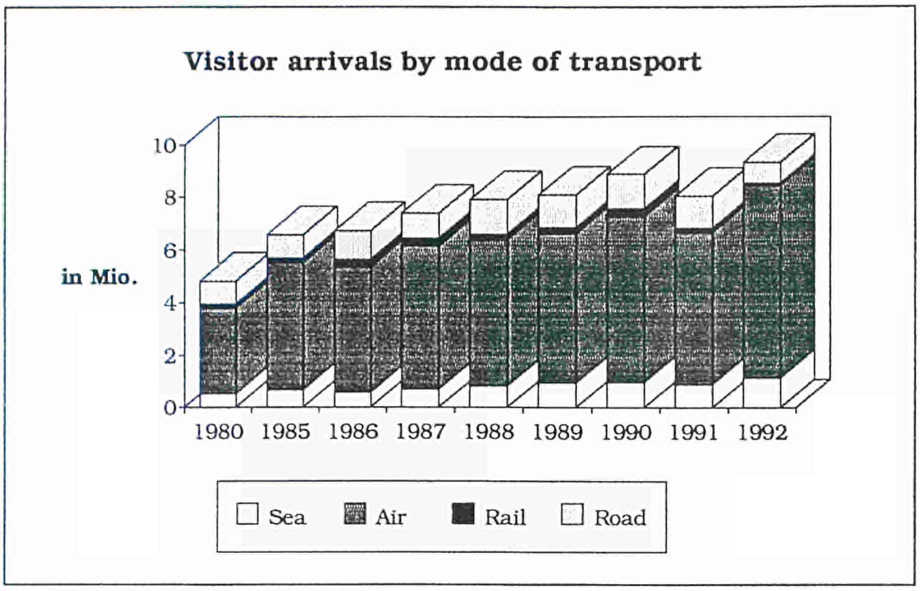
Visitors by country of residence, 1992



The different nationalities visiting Greece all present special characteristics and consumption patterns. A recent survey revealed significant differences in per capita tourist consumption between Americans and Europeans. On average, American tourists spend twice as much as Europeans.

Air transport is the most common form of travel used by inbound tourists (about 75% in 1992). Scheduled flights, which carry a high percentage of long-haul leisure passengers, upmarket holidaymakers, and business travellers are less important than charter flights.

More than half the arrivals by air in 1989 took charter flights, confirming the dominance of mass market package holidays over all other types of travel to Greece. Around 95% of these tourists came from the main markets in northern Europe. Charter services to Greece developed rapidly during the 1980s so that virtually every island airport receives direct flights from Austria, Belgium, Germany, The Netherlands, United Kingdom, and the Scandinavian countries. The government encourages tour operators and charter airlines to fly their clients direct to tourist destinations. It aims to reduce pressure on Athens airport and to distribute tourism receipts outside the capital. Actually, Athens still receives a substantial percentage of charter traffic and can become extremely overcrowded in July and August. The main island destinations are Corfu, Crete, Rhodes, Kos, Mykonos,



and Santorini. A large number of charters also fly to smaller island airports.

Many holidaymakers also arrive by road, primarily from Germany, Austria, and The Netherlands. During 1980-1992, approximately 17% of the tourists came by road. But the civil war in former Yugoslavia has almost halted this road traffic.

The number of tourist arrivals by rail is insignificant; the average annual rate is around 1.5%.

Cruises are a common form of travel for tourists either arriving from other countries or taking trips within Greek territorial waters. Cruise passengers totalled 1.14 million in 1992. Until recently most tourists using this mode of transport came from Italy (43% of total arrivals by sea in 1985).

Athens is the first choice as point of entry. In 1992 approximately 67% of air travellers and 43% of all tourists chose Athens as their first place of visit. It often serves as a stopover because there is no direct connection between the departure point and selected destination, mainly during the off-season when there are no charter flights and few scheduled connections. The island of Rhodes is the second point of entry and the destination selected by the bulk of Scandinavian tourists. A major point of entry for British tourists is Corfu.

The islands have the highest concentration of tourists. Greater Athens and Salonica are preferred by business travellers. The Greek government seeks to promote other areas that are currently less frequented by tourists. Tourist preferences vary according to nationality. Italians and Germans seem to opt for exploration as much as leisure; they mostly use nonorganized forms of travel and move between two and four times during their visit. Spaniards tend to prefer cultural tourism and focus on Greater Athens. Visitors from Scandinavian countries, mainly Finns and

Swedes, seem to congregate in a few areas, especially on the island of Rhodes, which was specially developed by Swedish tour operators.

Changes in tourist distribution since the early 1980s reveal a fall in the popularity of Attica and a shift of foreign tourists' preferences from larger towns towards Northern Crete, Chalkidiki, and similar destinations. Athens receives fewer visitors despite occasional surges. In 1991 the share of nights spent in Athens was about 37% of the total for Greece and in 1992 it fell although the total continued to rise.

General Situation and Key Indicators: Development and Impact of Tourism

The tourism industry has played a significant role in the Spanish economy since the 1960s. Spain is the main destination for European travellers in the Mediterranean region. Non-Europeans also form an important part of inbound tourism. The most popular vacation spots are the Balearic islands, the Canary islands, Catalonia, Andalusia, and greater Valencia.

In 1990 tourism contributed about 33% of the income from export of goods and services. The share of tourist activities in the gross national product (GNP) was estimated at 8.5%; it was higher than that of construction (approximately 8.3%) and banking (approximately 7%).

Travel (tourism) in the Balance of Payments
(million ecus)

	1980	1985	1986	1987	1988	1989	1990	1991	1992	1993
with EUR 12										
Credit (travel)	3 009	6 378	7 509	8 300	9 280	9 424	9 880	10 084	11 103	—
Debit (travel)	487	723	828	890	1 113	1 474	1 692	1 845	1 932	—
Net (travel)	2 522	5 654	6 681	7 411	8 167	7 950	8 188	8 839	9 171	—
Net account for all economic sectors	2 228	8 873	6 449	4 757	3 704	58	-1 335	-55	—	—
with Extra EUR 12										
Credit (travel)	2 013	4 265	4 654	4 498	4 850	5 332	4 646	4 815	5 988	—
Debit (travel)	398	592	702	808	967	1 323	1 628	1 840	2 336	—
Net (travel)	1 614	3 673	3 952	3 690	3 883	4 009	3 018	2 975	3 652	—
Net account for all economic sectors	-6 016	-5 146	-2 437	-4 818	-6 828	-9 944	-12 063	-13 574	—	—
with world										
Credit (travel)	5 021	10 643	12 163	12 799	14 130	14 756	14 526	15 499	17 091	16 513
Debit (travel)	885	1 316	1 530	1 698	2 080	2 797	3 320	3 685	4 268	4 021
Net (travel)	4 137	9 327	10 633	11 101	12 050	11 959	11 206	11 814	12 823	12 492
Net account for all economic sectors	-3 787	3 728	4 012	-61	-3 124	-9 886	-13 398	-13 629	—	—

1992 was an outstanding year for the Spanish tourist industry because of the World Exhibition in Seville, the Olympic Games in Barcelona, and the nomination of Madrid as the Cultural Capital of Europe.

Spain's status as a major tourist-receiving country is reflected in the balance of payments. Although the overall net balance is negative, the travel (tourism) balance is positive and it tripled from ECU 4 137 million in 1980 to ECU 12 492 million in 1993. Growth has, however, been slower since 1987. Tourism receipts from countries of the European Union (EU) contribute largely to the positive travel balance, despite high tourism expenditure by Spanish travellers in the EU.

The total number of arrivals at the frontier reflect the upward trend in the balance of payment figures. Arrivals rose steadily except for a downturn in 1990 (52 million, compared with 54 million in 1989 and 53.5 million in 1991). Arrivals from EU countries (45.5 million in 1991) account for approximately 85% of the total.

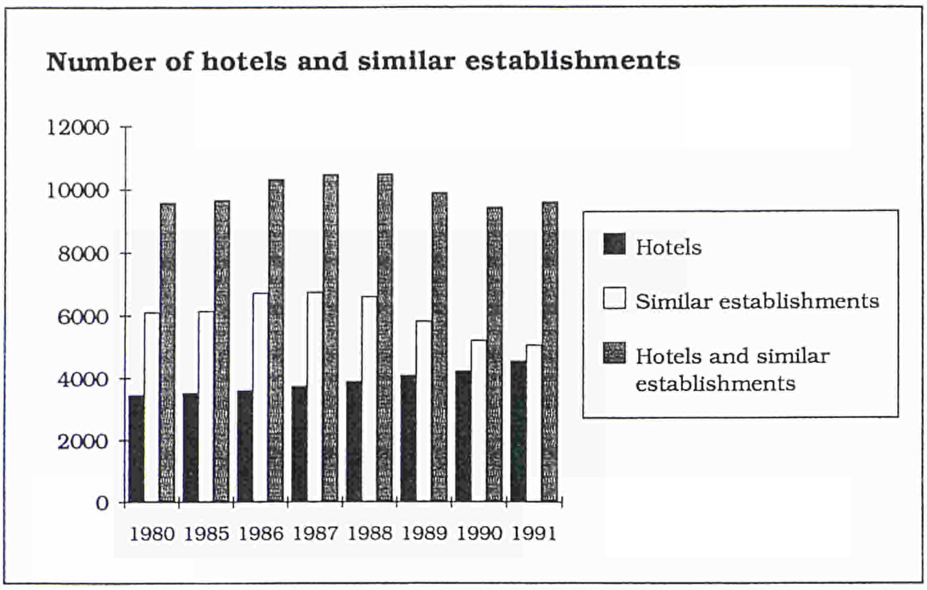
Tourism is an important job-creating sector in Spain. Officially, lodging and catering account for about 13% of employment in market services as a whole. In 1991 accommodation establishments and other tourist activities accounted for 5.4% of total employment. The slight downturn in 1990 translated as a 0.09% reduction in the share of tourism.

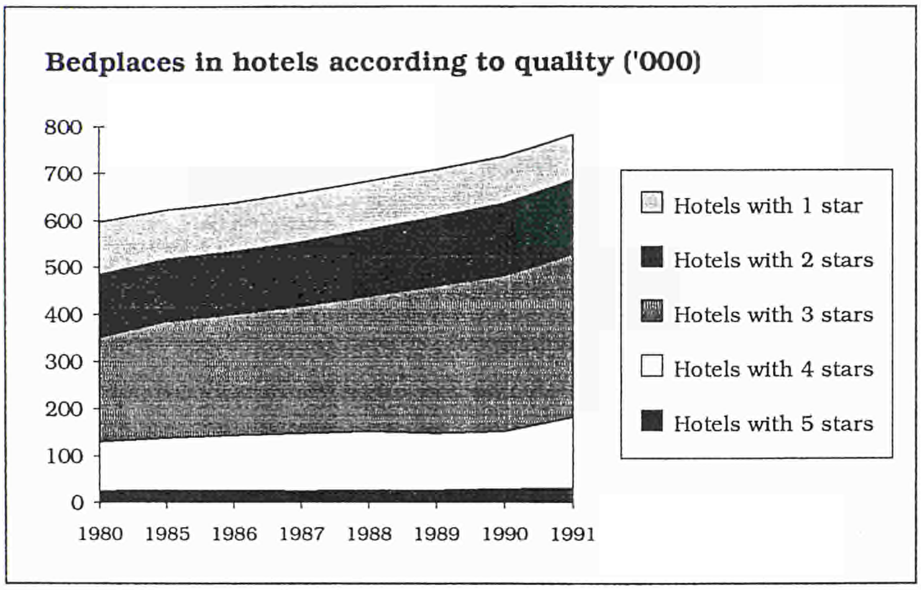
These figures do not show the indirect impact on the labour market, nor do they include the large number of unregistered workers, who represent a typical feature of the tourist industry. In certain regions (eg, Balearic islands and some of the Canary islands), tourism is the main source of employment.

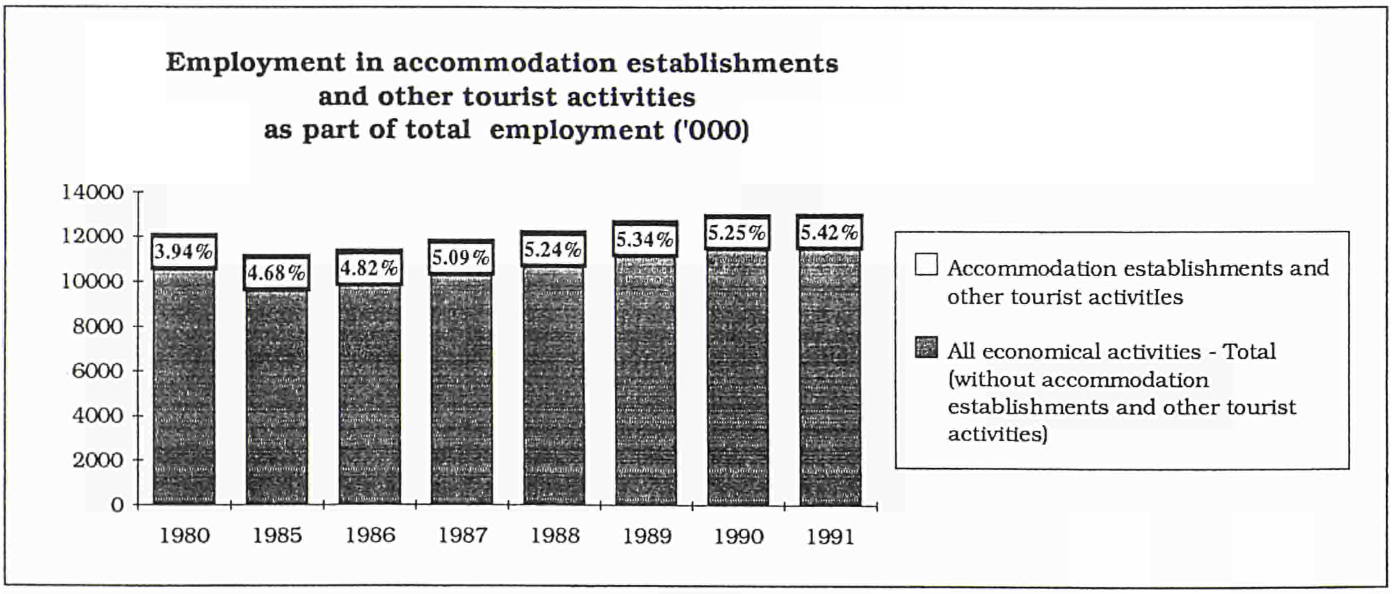
In its white book on Spanish tourism, the government outlined a series of priorities for further development of the sector. The proposals aim to upgrade tourism, to determine clear market segments, to promote cultural tourism and environmental protection, and to target non-European markets, especially the United States and Japan.

Tourism Supply

The number of hotels and similar establishments fluctuated around 10 000 during the 1980s. Their growth peaked in 1987–1988 but slowed down in the early 1990s.







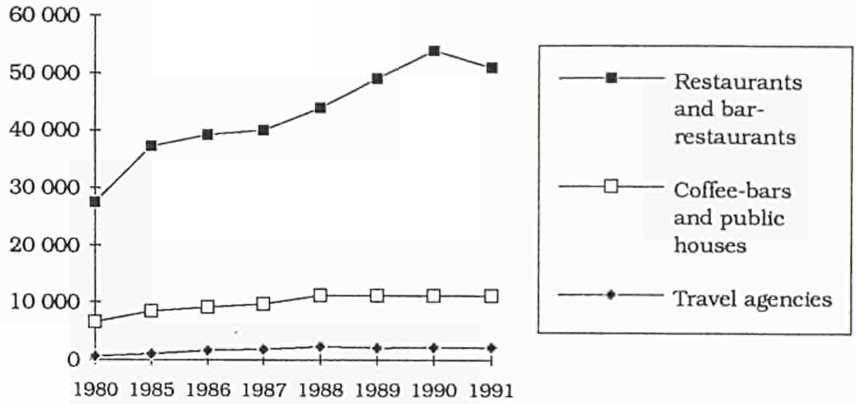
The proportion of similar establishments (accommodation establishments offering only limited hotel services) and hotels has changed. In the mid-1980s the share of similar establishments was approximately 65% of the total. By 1991 the shares of the two types of accommodation were almost even (similar establishments 52.6%, hotels 47.4%). This trend towards quality improvement of accommodation establishments is in line with priorities outlined in the white book.

Accommodation enterprises are also raising their capacity by increasing the number of bedplaces rather than establishments.

The highest number of bedplaces are recorded for 2- and 3-star hotels. During the 1980s the number of bedplaces grew for all categories, except 1-star hotels, which recorded a slight reduction. Highest growth was observed for 3-star hotels. The priority given to upmarket accommodations is confirmed by the sharp increase for 4-star hotels, from 122 337 bedplaces in 1990 to 149 852 in 1991.

Among the nonaccommodation tourist activities, restaurants, bar-restaurants, coffee bars, and public houses showed steady growth until the early 1990s. The annual growth rate in the number of travel agencies was around 20% until 1988; since then it has stabilized at approximately 2 200 establishments.

Number of establishments - other tourist activities



Transport infrastructure

Railways

	1980	1985	1986	1987	1988	1989	1990	1991	1992
Length of lines (km)	13 542	12 710	12 721	12 686	12 550	12 565	12 570	12 570	12 980
Passengers carried (Mio.)	167	198	194	190	194	182	274	316	358
Passenger-km (Mio.)	13 527	15 079	15 646	15 394	15 716	14 715	15 476	15 022	16 350

Road

	1980	1985	1986	1987	1988	1989	1990	1991	1992
Motorways (km)	1 923	2 117	2 154	2 276	2 344	2 424	2 558	5235*	6486*
Stock of buses and coaches	42 631	41 593	41 874	43 002	43 991	45 168	45 767	46 604	47 180
Cars (1000)	7 557	9 274	9 643	10 219	10 787	11 468	11 996	12 537	13 102
Cars per 1000 inhabitants	278	303	316	337	355	388	399	430	458

Aviation

	1980	1985	1986	1987	1988	1989	1990	1991	1992
Aircraft movements-all (1000)	684	714	728	816	910	960	1 048	1 107	—
Total passengers (1000)	45 560	50 541	55 780	62 917	68 288	70 872	73 142	75 422	—

* including divided highways

Road and air transport developed rapidly, while rail transport stagnated until 1991.

Passengers generally prefer air to rail transport for long-distance travel.

The significance of road transport is seen from the steady expansion of the network and the increase in the number of cars per 1 000 inhabitants (458 in 1992).

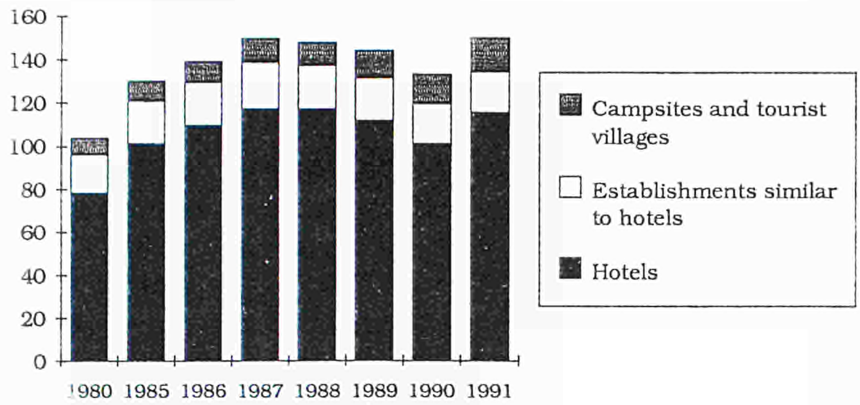
While annual passenger kilometres for rail transport have fluctuated around 15 000 million from 1985 to 1991, a strong increase is indicated for 1992 (16 350 million). The absolute number of passengers increased significantly from 198 million in 1985 to 358 million in 1992. Long-distance travellers appear to use rail transport less frequently. Network length has been steadily reduced and in 1989 it totalled 12 565 km. The launching of the high-speed rail link (AVE) between Madrid and Seville in 1992 added a few hundred kilometres to the network again.

Tourism Demand

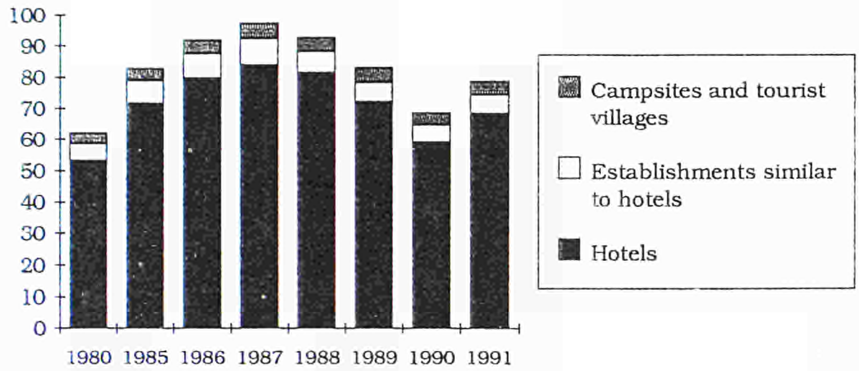
Demand created by inbound tourism is of particular importance to the Spanish economy. Its impact is significantly greater than that of domestic tourism demand.

Total nights spent in accommodation establishments increased until 1987, when they reached a

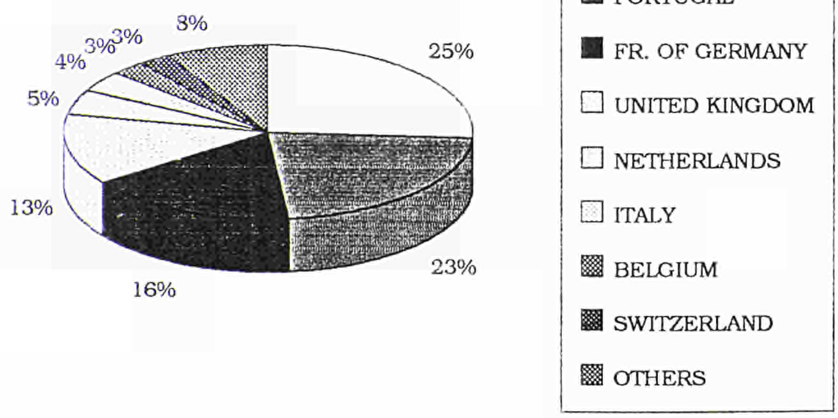
Nights spent in accommodation establishments (Mio.)



Nights spent in accommodation establishments - non-residents (Mio.)



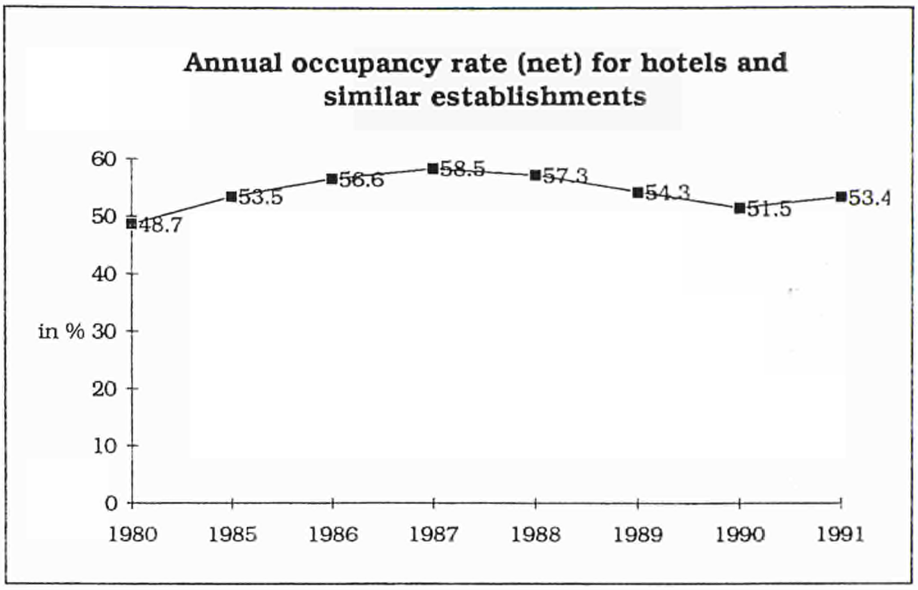
Arrivals of visitors at the border by country of residence, 1991



maximum of approximately 150 million. The downward trend until 1990 (133 million nights) was checked by strong positive development in 1991. Overnights by nonresidents generally represented approximately 55% of the total, but the proportion decreased slightly towards the end of the 1980s.

Three different groups of countries of residence can be distinguished.

Neighbouring countries France and Portugal together account for 48% of all arrivals, including same-day visitors and commuters, particularly in the case of Portugal. In the group of "package tour countries", the most important are Germany (16% of arrivals) and the United Kingdom (13%). Together they accounted for 45 million nights in hotels and similar establishments in 1991 and for approximately 65% of the non-resisdents in these establishments. They are followed by France (6.7 million nights).



Other important countries of inbound tourism are The Netherlands, Italy, Belgium, and Switzerland.

Net occupancy rates for hotels and similar establishments were comparatively high in the 1980s and followed the same trend as overnights in accommodation establishments. The rate peaked at 58.5% in 1987; it dropped to 51.5% in 1990 but recovered in 1991 (53.4%).

Data on demand created by the Spanish residents abroad are not complete and should be interpreted carefully. Based on the number of nights spent by Spanish guests in hotels and similar establishments abroad, France is the most attractive destination (about 2.9 million nights), followed by Italy and Portugal (about 1.9 million nights each). Other destinations include Germany and the Scandinavian countries.

General Situation and Key Indicators: Development and Impact of Tourism

France is the top tourist destination in the world in terms of arrivals and the second favourite destination after the United States of America in terms of tourism receipts. In 1992, France welcomed 59.6 million foreign tourists and international travel receipts amounted to ECU 19 364 million.

1989 had been an exceptional year. The bicentenary celebrations and continued economic growth in the major industrial countries attracted more than a 16% rise in the number of tourists, compared to 1988. In 1990 tourism continued to boom, and in 1991, despite the Golf crisis, international tourism in France continued to progress positively, albeit at a slower pace.

In terms of tourism trade surplus, France ranked third in 1992, behind Spain and the United States. The surplus on the tourism account of France rose significantly between 1988 and 1989 from ECU 3 445 million to ECU 5 645 million, and has since increased considerably in the nineties to reach ECU 8 455 million in 1992.

Thus, tourism makes an essential contribution to France's foreign trade balance, which has during this period remained negative. In terms of receipts, tourism represented 6% of total receipts for goods and services and 14% of total services receipts in 1991.

Nearly half of the tourism receipts of France are in currencies of the EU countries. In 1992, EU tourism receipts represented over 44% of total receipts. Over the past years, the share of receipts in EU currencies has been rising (41% in 1989, 43% in 1990, 45% in 1991). This development may partly be related to the creation of the EU Single Market. Moreover, one of the effects of the Golf crisis is that people tended to travel less far in 1991.

In 1991 and 1992, the biggest EU spender in France was Germany, representing over 26% of total EU receipts, followed closely by the United Kingdom with 24% in 1991, but falling to 23% in 1992 (due to the sharp fall in the rate of sterling) and Italy with 15% in 1991 and nearly 17% in 1992.

Although receipts in Swiss Francs represent the largest share of extra EU tourism receipts

Travel (tourism) in the Balance of Payments
(million ecus)

	1980	1985	1986	1987	1988	1989	1990	1991
with EUR 12								
Credit (travel)	2 946	3 512	3 607	4 196	4 739	6 122	6 886	7 772
Debit (travel)	2 364	2 529	2 878	3 471	3 918	4 395	4 606	4 813
Net (travel)	583	983	729	725	821	1 727	2 280	2 959
Net account for all economic sectors	-2 107	-9 285	-8 324	-9 105	-7 909	-9 390	-7 696	-7 332
with Extra EUR 12								
Credit (travel)	2 981	6 989	6 298	6 102	6 928	8 634	9 013	9 509
Debit (travel)	1 962	3 496	3 756	3 897	4 304	4 716	5 179	5 154
Net (travel)	1 019	3 493	2 542	2 205	2 624	3 918	3 834	4 355
Net account for all economic sectors	-895	8 399	10 211	4 800	4 032	4 713	900	2 534
with world								
Credit (travel)	5 927	10 501	9 905	10 298	11 667	14 756	15 899	17 281
Debit (travel)	4 326	6 025	6 634	7 368	8 222	9 111	9 785	8 113
Net (travel)	1 602	4 476	3 271	2 930	3 445	5 645	6 114	7 314
Net account for all economic sectors	-3 002	-886	1 887	-4 305	-3 877	-4 677	-6 796	-4 798

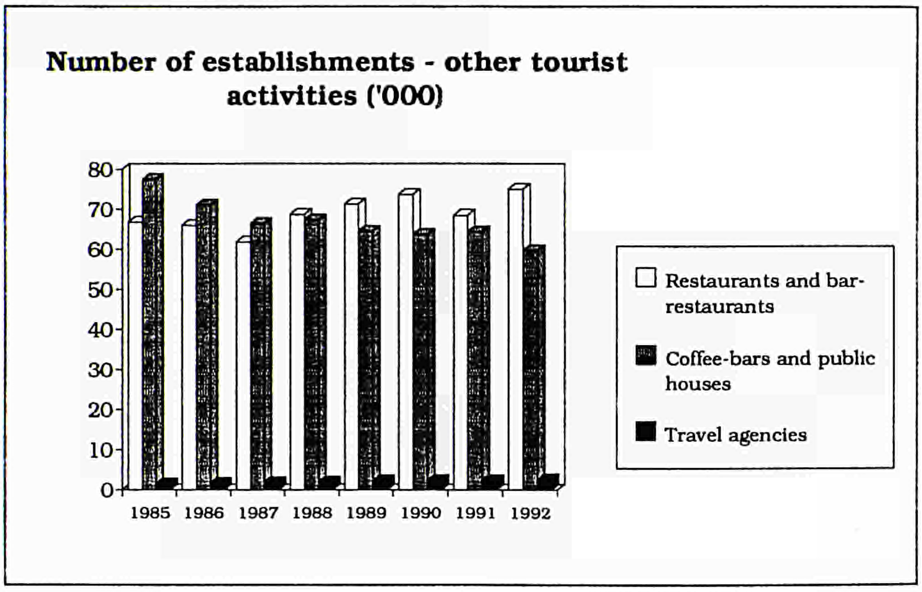
(over 48% in 1992), this share can not simply be attributed to expenditures of Swiss tourists in France, but more to the particular characteristics linked to this currency.

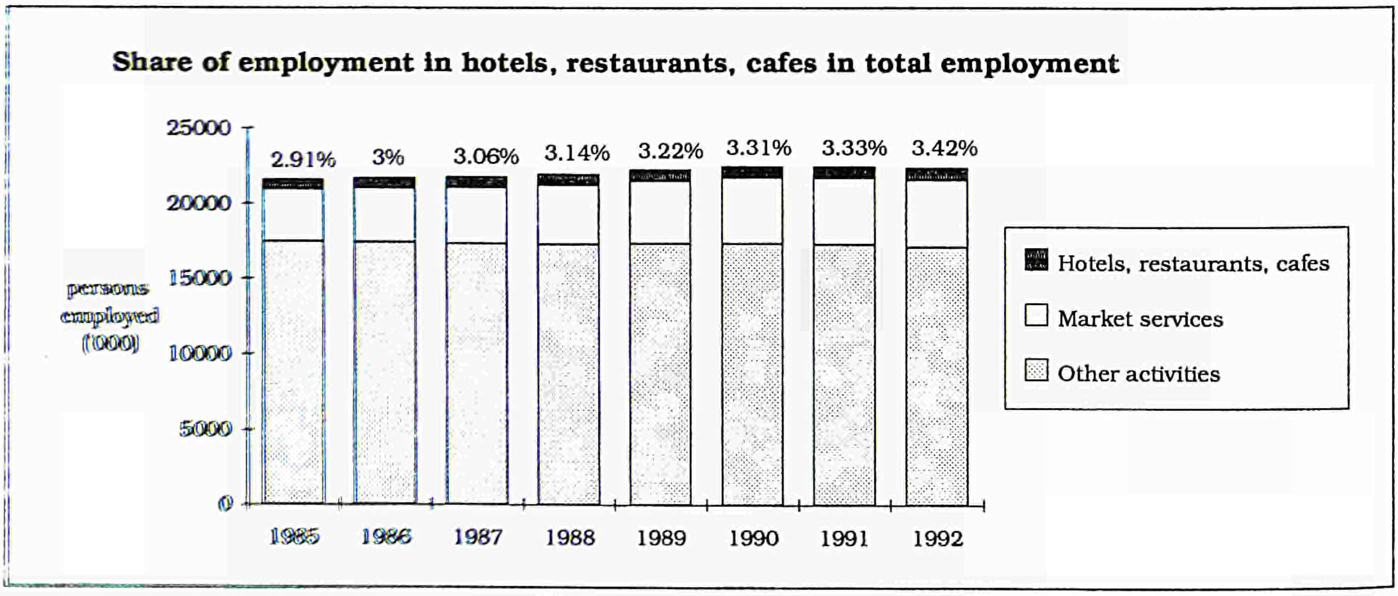
The US dollar represents 23% of total tourism receipts from outside the 12 EU Member States. This share has considerably fallen over the past years, in 1989 receipts in US dollars represented 33% of total extra EU tourism receipts. This may in part be due to the recession in the United States and the fall in the rate of the dollar. The Japanese currency represents 5% of extra EU tourism receipts in 1992, compared to 6.5% in 1989.

It is interesting to link this information to the number of arrivals at the borders. The overwhelming majority of tourists are from the EU (80% in 1992). Over the past years the arrivals of EU tourists have been rising constantly (average rate of increase 7% between 1989 and 1992), whereas the number of extra EU tourist had been falling slightly (average rate of decrease 2% between 1989 and 1991), but picked up again in 1992. The Golf crisis was particularly detrimental to arrivals of American tourists, which fell by 18% compared to the year before.

Total expenditure of non resident tourists and French tourists in France has been rising steadily during the early nineties. Domestic tourism consumption amounted to FF 465 500 million in 1990, FF 490 100 million in 1991 and rose to over FF 520 100 million in 1992. Estimates point to domestic tourism consumption reaching FF533 700 million in 1993.

Tourism contributes substantially to the French economy in terms of value added and employment. An important share of lodging and catering services offer their services to tourists. According to National Accounts, total value added of lodging and catering





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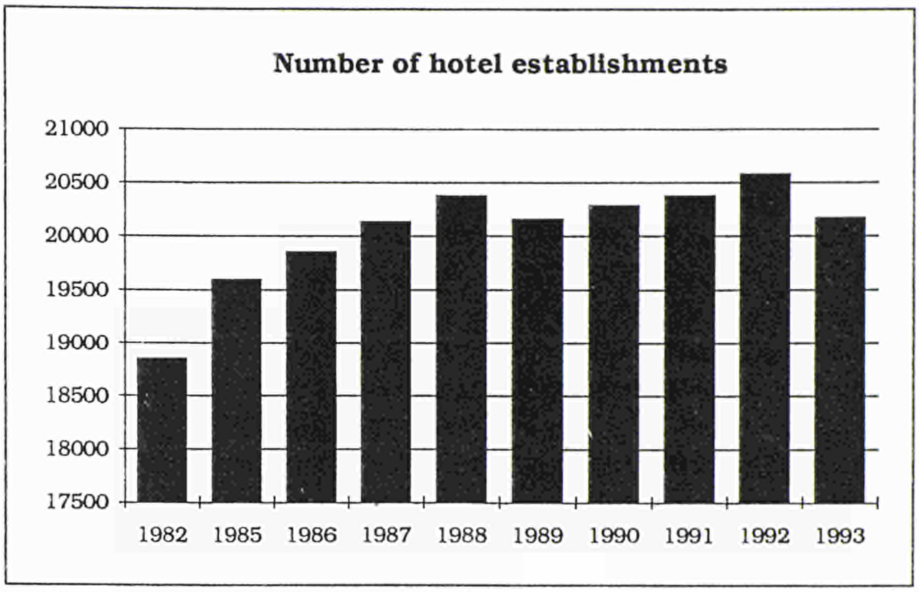
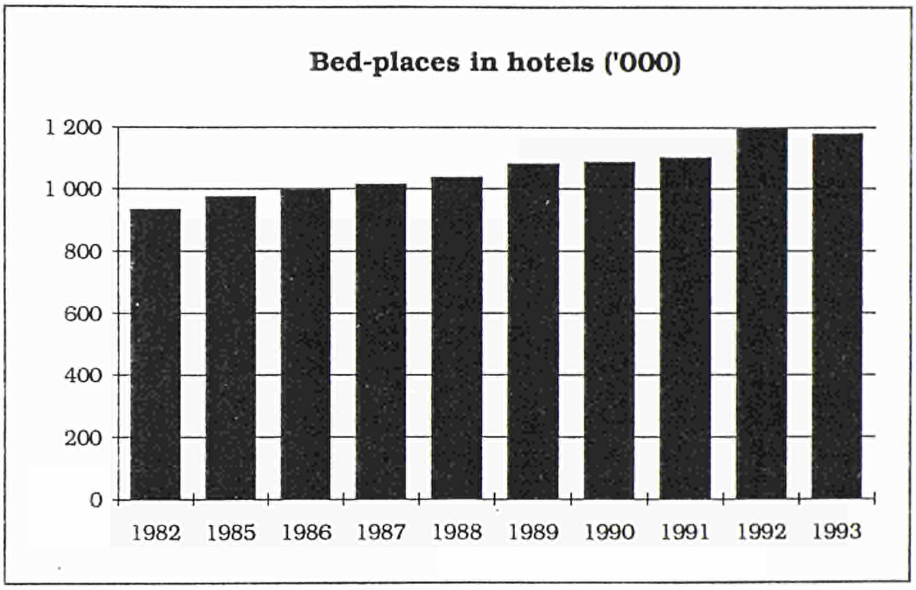
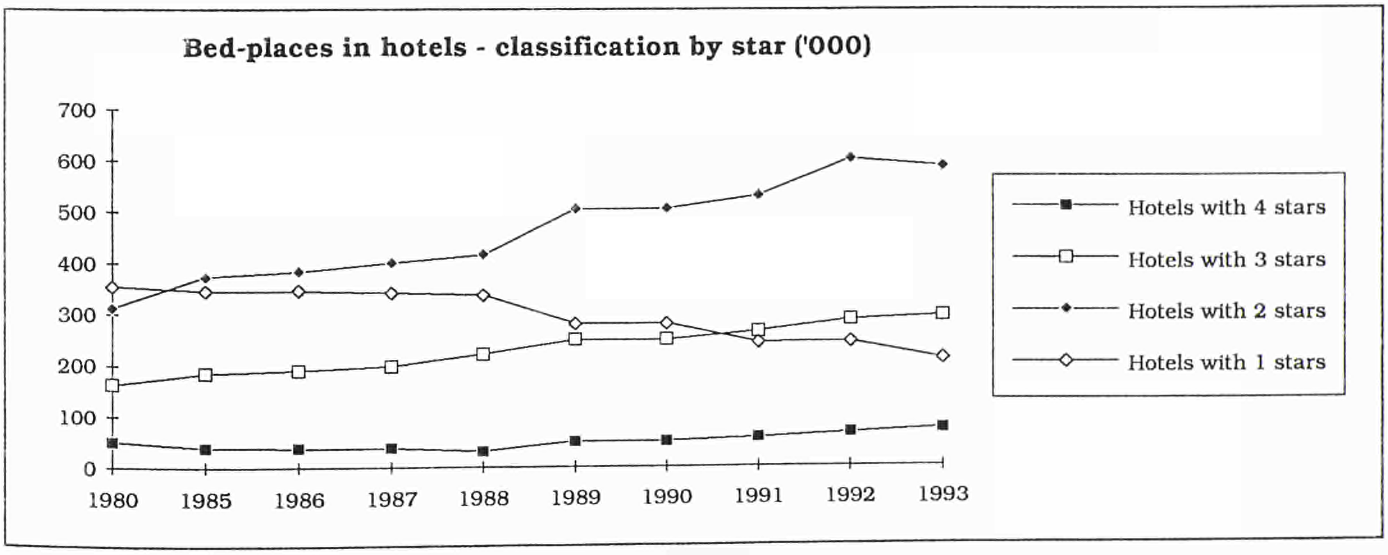
services amounted to FF 202 000 million, which represents nearly 15% of market services and 3% of the total value added of the economy in 1992. Over the past decade, the share of lodging and catering services in valued added of market services and total value added has not varied considerably.

The tourism sector is an important generator of employment representing 18 % of employment in market services and 3.6% of employment in the economy as a whole. According to National Accounts 764 700 persons worked in the lodging and catering sector in 1992, of which 74% were salaried employees. Whereas growth in employment in the economy as whole has been minimal (less than 1% per annum) during the period 1987 to 1990, employment in the lodging and catering sector grew by over 3% annually. In 1991 and 1992 employment in this sector continued to increase albeit at a slower pace (1% in 1991 and 2% in 1992), whereas total employment in the economy stagnated in 1991 and dropped in 1992.







Seasonal employment is a phenomenon of the tourism sector in France as in other countries. According to a study made by the Ministry of Tourism in 1985, the gap between the highest level of employment in Tourism and the lowest during a year may represent 38%.

A breakdown of salaried employees by tourism related sectors, shows that the biggest employers are restaurants and bar restaurants. Employment in restaurants and cafes-restaurants has been slowing down at the beginning of the nineties, after having experienced an average annual rate of growth of 7% between 1986 and 1990. Between 1990 and 1991 employment in this sector grew by 2.5% with practically no increase in 1992 (242 551 salaried persons). Employment in hotels and hotel-restaurants grew at a slower pace with an average annual rate c growth of 4% (1986-1990). I 1991 it dearly increased com pared to 1990 and in 1992 fe slightly (156 050 salaried pe sons). The third largest touris related employer is cafes an bars. In this activity employme has dwindled slightly over th past years and totalled 49 94 salaried employees in 1992. Ar other important employer i "other types of accommodation (e.g. camping sites, holida dwellings, etc.), which employe 40 789 salaried persons in 199 Finally travel agencies employe 25 120 salaried persons in 1992.

In 1991 turnover in the lodgin and catering sector showed posi tive growth rates for all three su sectors (hotels, bars, restaurants) although these growth rates ar lower than for the period 1988 1990. In 1991 turnover totalle FF 212 262 million (an increas of 3% compared to 1990), c which 43% is made up by th turnover of restaurants and ba restaurants. In 1991 cafes an bars experienced the highest rat of growth of the three subsecto with a 7% annual increase i turnover. Finally, after havin experienced since the mi eighties fairly substantial year t year growth, the turnover c travel agents dropped in 1991 b nearly 2% compared to th previous year.

Investment in the lodging and ca tering sector rose significantl between 1986 and 1987 (22%) and continued to grow during th next two years. From 1990 t

Transport infrastructure

Railways

	1980	1986	1987	1988	1989	1990	1991	1992
Length of lines (km)	34 382	34 665	34 644	34 599	34 469	34 260	33 990	33 555
Passengers carried (Mio.)	685	779	782	810	838	842	837	829
Passenger-km (Mio)	55	60	60	63	65	64	62	63

Road

	1980	1986	1987	1988	1989	1990	1991	1992
Motorways (km)	5 287	6 019	6 207	6 328	6 680	6 824	7 080	7 408
Cars (1000)	19 130	21 500	21 970	22 520	23 010	23 550	23 810	24 020
Cars per 1000 inhabitants	354	387	394	402	407	414	417	419
Stock of buses and coaches	65 000	72 000	71 000	72 000	72 000	75 000	77 000	76 000
Passenger-km by bus/coach (1000 Mio)	38	39	42	42	40	41	43	41

Aviation

	1980	1986	1987	1988	1989	1990	1991	1992
Aircraft movements - all (1000)	690	742	784	858	939	1 019	1 101	1158
Total passengers (1000 Mio/passengers-km)	5.3	8.3	8.9	9.6	11.0	11.4	11.4	12.0
Passengers handled in Paris (1000)	26 045	33 525	37 048	40 701	44 958	46 836	45 296	50 369

1992 gross consolidated capital assets stagnated at FF 33 000 million per year. This represents nearly 18% of investments made in all market services and over 2% of all investments made in the economy as a whole.

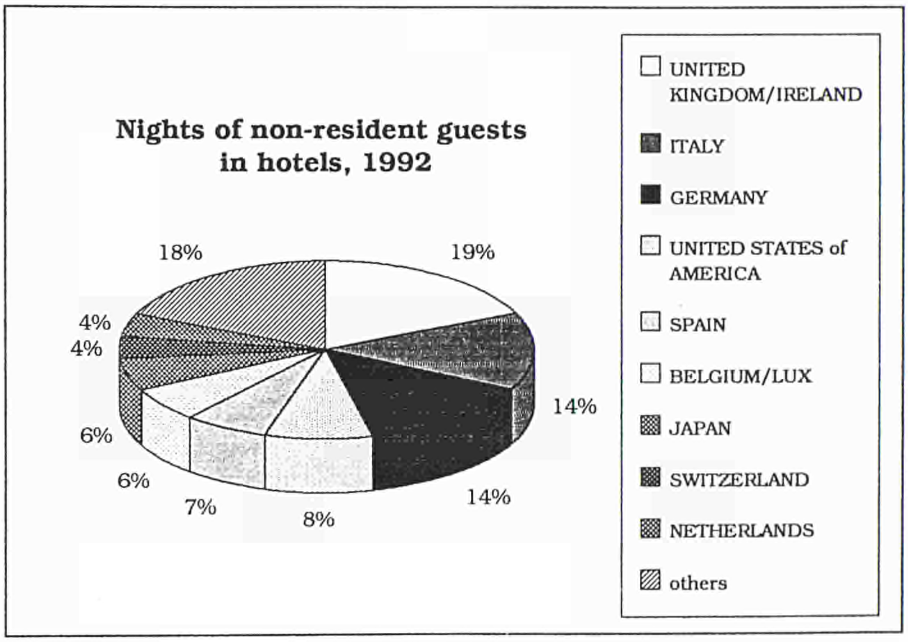
Tourism Supply

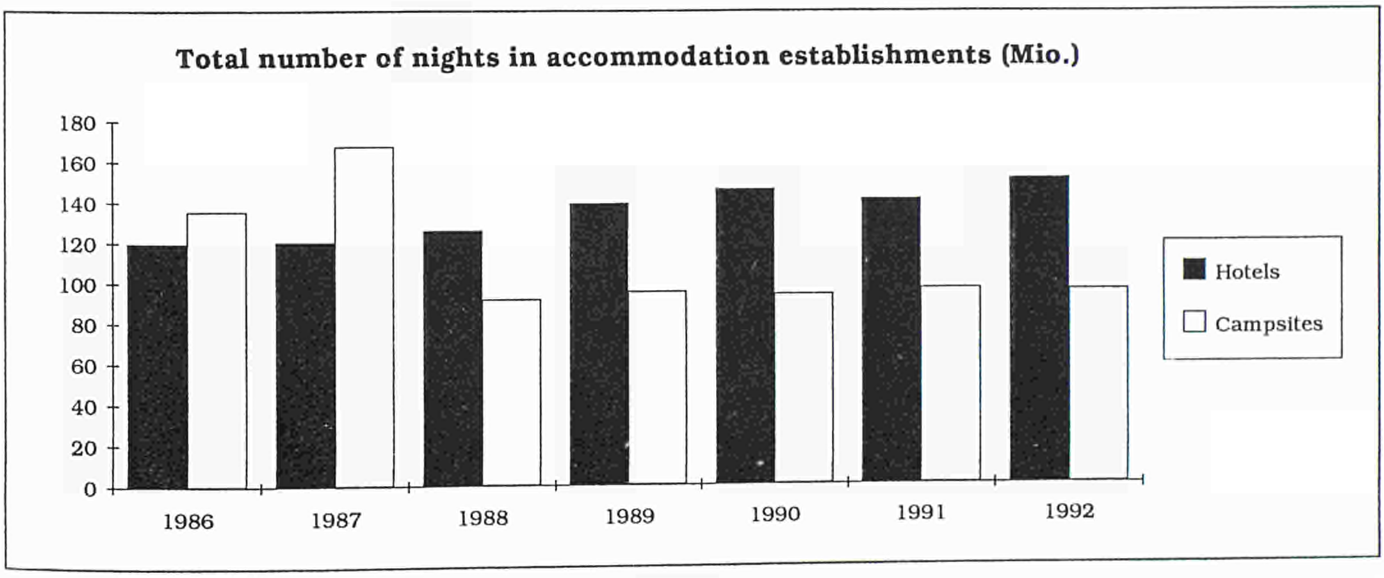
The supply of tourism related activities in France is largely made up of small and medium sized companies. The restaurant business flourished during the late eighties and attained its highest number of enterprises in 1990 (73 747). In 1991 this trend reversed and the number dropped to 68 476 restaurants and bar restaurants. The trend for cafes and bars has been different. During the second half of the eighties, their number has fallen year after year from 77 544 in 1985 to 63 692 in 1990. In 1991 however, they showed signs of picking up and numbered 64 320. Travel agencies considerably expanded over the eighties, increasing by over 14% between 1988 and 1990, to total 2 369 enterprises in 1990.

However, in 1991 the period of growth came to an end and the number of enterprises fell slightly (2 340).

Tourist accommodation is a main sector of the tourism industry in France. Although a change in the methodology for accommodation statistics occurred after 1988, the general trends can still be observed.

In 1993 20 174 classified hotel establishments offered their services to tourists. From 1989 to 1992 the number of hotel establishments increased very slowly and peaked at 20 582. The number of bed places, on the other hand, increased at a faster pace throughout this period, particularly between 1991 and 1992 (increase of 8.7%) and totalled





nearly 1.2 million in 1992. The general trend has been for hotels to increase capacity, rather than expand in number. Although the number of bed-places fell in 1993 as the number of establishments dropped, the result was less pronounced. Another significant feature of the development in the hotel sector in France is the tendency towards improving the quality of supply. This is indicated by the fall in the number of one star hotels (a drop of 22% between 1989 and 1992), which has in particular been compensated by an increase of 7% in the number of two star hotels.

Another important supplier of tourism accommodation are camping sites and holiday villages. The number of camping sites jumped significantly between 1980 and 1985 by 20%, and since have increased slowly to arrive at a total of 8 564 in 1992. The number of camping pitches has followed a similar pattern, arriving at 889 093 in 1992.

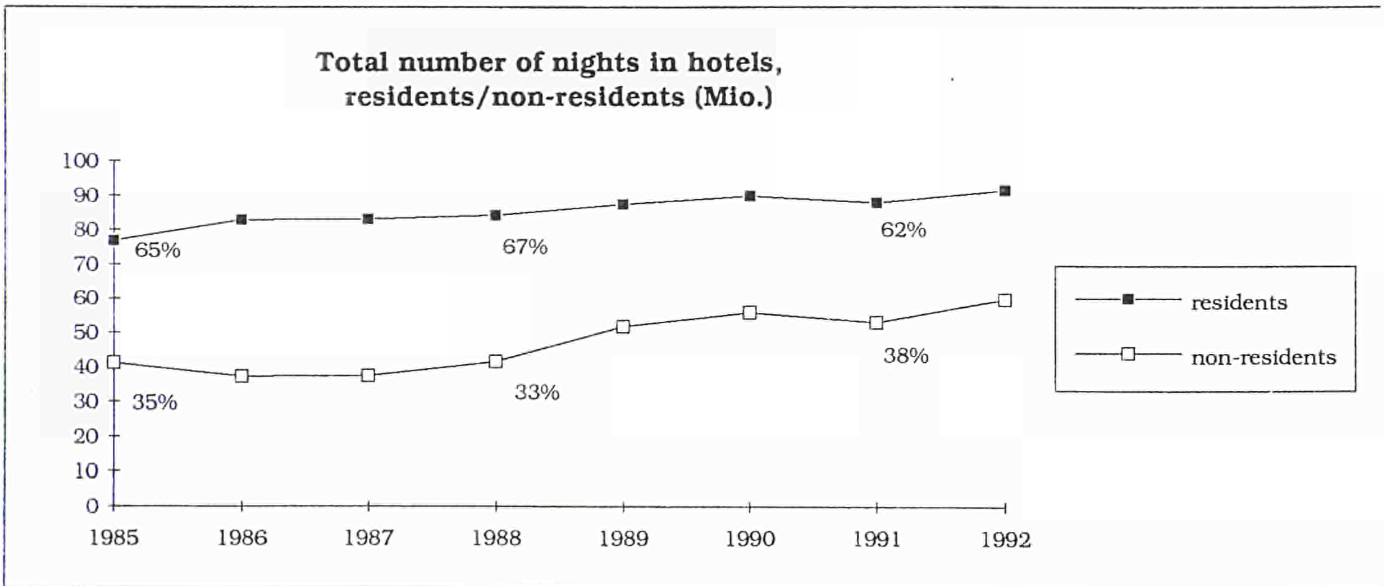
Holiday villages numbered 723 in 1992, offering 234 864 bed places. Compared to 1991, the number of holiday villages has decreased by nearly 16%.

In 1992 there were 186 youth hotels, offering a capacity of 12 163 bed places. Between 1991 and 1992, the number of youth hostels have decreased by 13% and bed places have fallen by 30%.

Thus it would seem that after a period of rapid growth during the beginning of the eighties and slow growth in the second half, these types of tourist accommodation have reached in the early nineties an optimum level of supply to satisfy current tourism demand.

Letting of private accommodation is important in France. According to the figures for 1992, the French communes own over 3 800 *gîtes*. 33 993 are owned by private agents, much of which are in rural areas. *Chambres d'hôtes*, which are rooms let by private persons to tourists amounted t 11 168 rooms in 1992. Secon homes of French resident amounted to 2 822 315 in 199(which on the demand side is re flected by the fact that 13 % c French residents spend their holi days in France in their secon home.

Transport infrastructure plays a important role in the way tourist travel from one place to anothe The length of rail in France ha been falling slowly over the pas decade, since the emphasis ha been placed on upgrading exis ing lines and constructing a hig speed network (TGV). The shar of electrified network rose fro under 30% in 1980 to over 40 in 1992. Lines being able to tak traffic at more than 200km pe hour rose from 854km t 2 958km in 1992. Investment i constructing the TGV networ has been high. In 1991 near half of rail infrastructure expen diture was for the construction c new TGV lines, and in 1992 F 8 500 million were invested. Th aim is to offer a speedy an



efficient alternative to air and road transport. Between 1980 and 1985 passenger-km traffic increased by 13%. Since then the figures have fluctuated, but are largely positive. In 1989 the figure reached its highest level so far (64 000 million passenger-km). In 1992 passenger-km traffic totalled nearly 63 000 million.
Linked to rail is the ambitious construction of the Eurotunnel, for which the global cost is now estimated at ECU 13 141 million. The present forecasts reckon on 44 million passengers using the tunnel by the year 2003.

To ease road congestion, motorway construction has continued. Over the period 1980 to 1991 the length of motorway has increase by 30%. Within the same period traffic density has risen from 16 000 vehicles per day to just under 20 000.

The air transport infrastructure of France is also well developed. It counts over principal 20 regional airports (plus six in the overseas territories). The airports of Paris (CDG, Orly, Le Bourget) are the second busiest airports in Europe, handling an estimated figure of 50.4 million passengers for 1992.

Tourism Demand

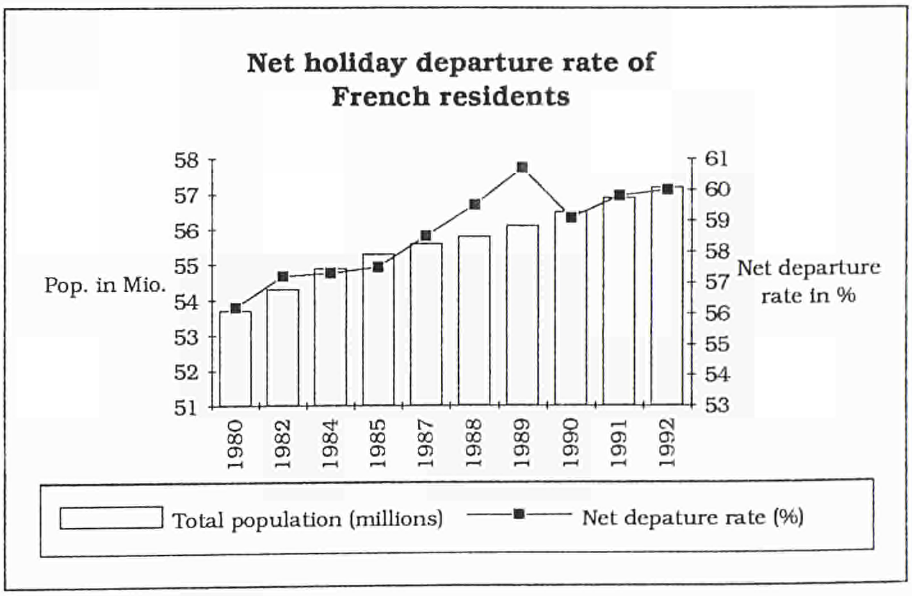
France has the advantage of a favourable geographic position within Europe, a mild climate and diverse landscape. It enjoys the benefits of various forms of tourism : both summer and winter holidays, cultural and rural tourism and business tourism. France conducts a very active tourism policy to promote tourism and to attract new types of visitors.

In 1992 over 47.4 million tourists came from the EU and 12.2 million came from extra EU countries. Tourist arrivals from Germany is the highest with over 12.5 million trips, followed by the United Kingdom with 8.2 million, representing respectively 26% and 17% of total EU arrivals into France. Italy and Belgium both accounted for 15% respectively, followed by the Netherlands with 13% of total EU arrivals into France.

Switzerland and the United States provided the highest inflow of extra EU visitors, representing 19% and 16% respectively of all extra EU tourism into France. Tourists from Japan represented nearly 4% of total extra EU arrivals into France.
For 1992, total nights spent in hotels and camping sites reached 241 million, of which for hotels 39% and for camping sites 33% were accounted for by non residents. Once again due to a change in methodology in 1988 no direct comparison can be made between the period before and after, nevertheless the evolution of nights spent in these two types of accommodation can be seen : whereas nights spent in hotels rose continuously between 1988 and 1992, those in camping sites have tended towards stagnation.

Nights spent in hotels by non residents rose remarkably in 1989 (partly due to the bicentenary celebrations) by 26% in 1989 from 41 million in 1988 to 51 million. In 1990, nearly 56 million nights were spent by non residents in hotels. In 1991, nights spent in hotels slumped by 5% before reaching new record heights in 1992, with over 59 million nights spent.

The number of nights spent according to the country of resi-



dence follows a similar line as arrivals of tourists at the borders. The main generating country in terms of nights spent in hotels is the United Kingdom, followed by Germany, Italy, and the United States.

Nights spent by French residents in hotels followed a similar positive trend, with an increase of nearly 6% in 1989 compared to the previous year. 1990 experienced an increase of 2.5% compared to 1989, dropping by 2% in 1991, only to rise to nearly 92 million in 1992.

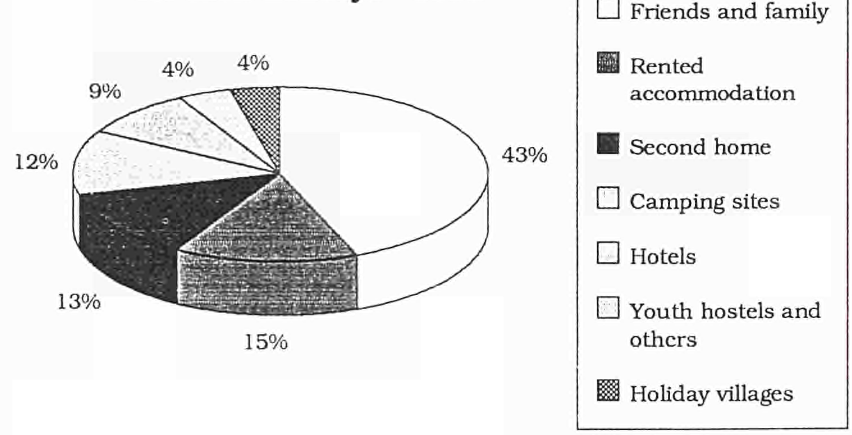
The evolution of nights spent by residents and non residents in camping sites since 1988 has fluctuating between the 93 to 96 million mark.

Concerning national tourism demand, the number of holiday trips (lasting a minimum of 4 days) taken by French residents in France and abroad has been rising steadily throughout the eighties, and reached 67 million in 1992. More French people are participating in tourism (56% in 1980 and 60% in 1992). The average number of trips per person has risen to nearly two per year, with a drop in the average duration of the trip from 16.4 days to 14 days. This means that French people tend to go on holiday more frequently (a summer and winter holiday), but for shorter periods.

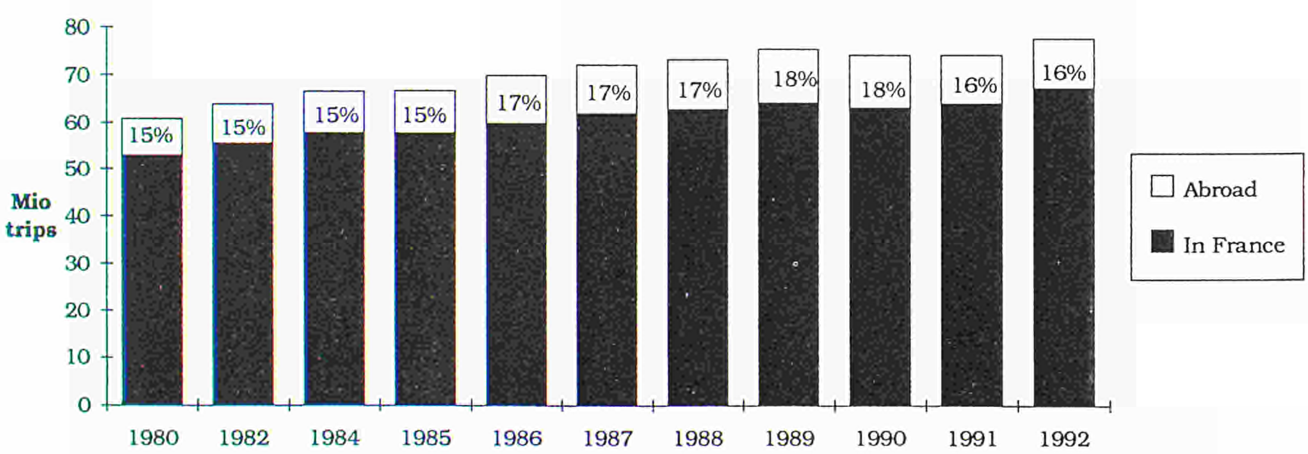
Seaside resorts remain the most favoured destination (35%), followed by the countryside (24%) and the mountains (20%). Al though summer holidays repre sent the biggest bulk of holidays winter holiday demand is grow ing more rapidly. The majorit of the French tend to spend thei holidays at the homes of friend or relatives (45%).

The main mode of transport re mains predominately the ca (75%). This can in good part b explained by the fact that mor and more French own a car (41 cars per 1 000 inhabitants i

Type of accommodation used by the French for their holidays - 1992



The French on holiday: number of stays in France and abroad



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1990), the fact that France is conveniently placed within the continent of west Europe and the fact that the overwhelming majority of the French spend their holidays in France : in 1992 81% of holiday trips were taken in France (56.4 million holidays in France compared to 10.7 abroad).

The majority that travel abroad tend to stay within Europe. The preferred foreign destinations in terms of nights spent remain Spain, Portugal and Italy (of which nearly 40% can be attributed to immigrant workers returning to their native country for holidays).

Expenditure on tourism by French residents follows a similar pattern to their propensity to travel. Expenditure in the country and abroad showed average annual increases of 6.5% during the second half of the eighties. In the early nineties, however, the yearly increases have been rather modest (3%) and mainly sustained by French tourist expenditure within the country.

In 1992 French tourism expenditure (consumption relating directly to the trip and transport) reached FF 420.3 thousand million, of which nearly 27% was spent abroad. It is interesting to note how tourism expenditure abroad can fluctuate according to the economic and political international climate. During the late eighties French residents increased their expenditure abroad by over 9% per annum, but in 1990 expenditure only increased by 2% compared to the previous year and fell by 5% in 1991 compared to 1990. A modest increase (2%) occurred in 1992 and estimates for 1993 point to French tourist expenditure abroad picking up again. Expenditure within France by French residents, on the other hand, has been more stable, and averaged increases of 5% to 6% per annum between 1987 and 1992, with the exception of 1990 (4%).

Tourist expenditure (Thousand Mio national currency)	*1980*	*1985*	*1986*	*1987*	*1988*	*1989*	*1990*	*1991*	*1992*
Residents in the country	120.4	214.5	223.3	237.4	250.5	263.3	274.6	291.7	306.7
Residents abroad	39.0	77.9	83.5	92.2	101.5	114.7	117.0	111.7	113.6
Non-residents in the country	49.6	76.9	71.6	78.1	90.1	110.8	115.4	123.5	136.5

General Situation and Key Indicators: Development and Impact of Tourism

Tourism makes a substantial contribution to the Irish economy. It is estimated that tourism revenues account for 7.1% of GNP. In 1993, 3.8 million non-resident tourists visited Ireland, contributing ECU 1 365 million in travel receipts. Between 1989 and 1993 overseas tourists increased by over 18% and foreign exchange earnings rose by 30%. The increase in tourism numbers and revenue was due to a number of factors, including: investment in tourism facilities, increased relative price competitiveness, improved access, greater "green consciousness", and more effective promotion.

Over the past decade travel receipts have for every year represented some 4 % of total current account receipts and over 40% of services receipts. From 1982 to 1993 travel receipts showed year to year favourable increases, with the exception of a decrease in 1986 of 5%. This decrease is partly due to a fall in arrivals (19%) and travel earnings (20%) from North America. Both receipts and arrivals picked up the following year and from then on showed healthy increases.

In 1991 travel receipts rose by nearly 8% compared to 1990, in 1992 they rose by nearly 2% compared to 1991, and in 1993 they increased by over 9% compared to the previous year.

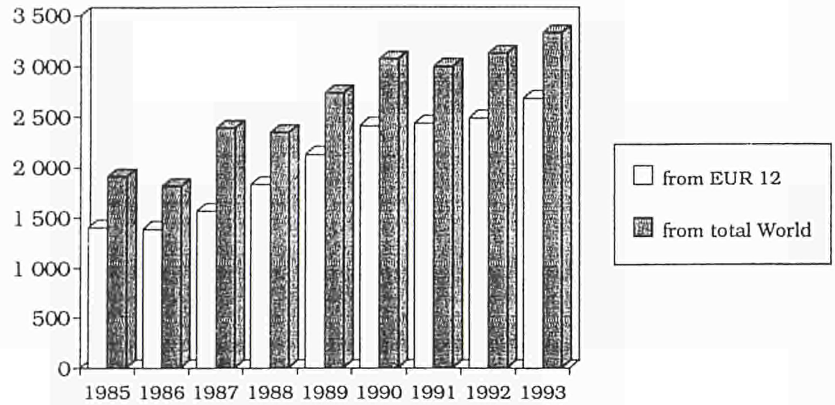
The Irish economy benefits from a positive rate of coverage for its travel item. Tourism has provided Ireland with a net travel account of ECU 319 million in 1993. The net travel account substantially increased during the past decade, and saw a particularly favourable increase between 1989 and 1990.

Travel (tourism) in the Balance of Payments
(million ecus)

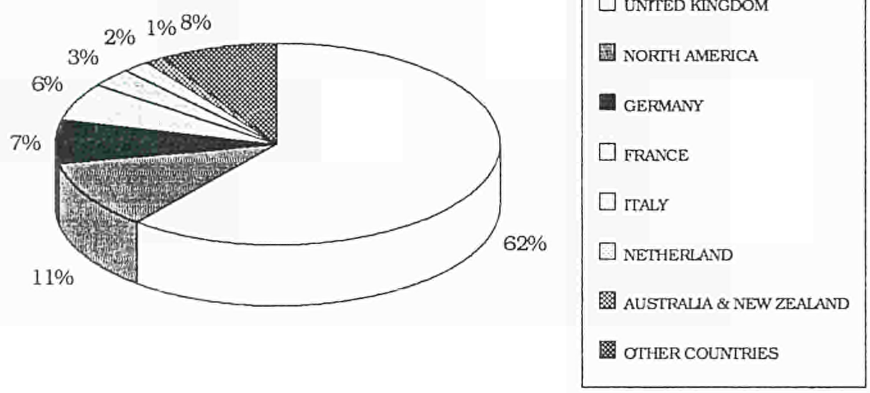
	1980	1985	1986	1987	1988	1989	1990	1991	1992	1993
with EUR 12										
Credit (travel)	348	486	453	492	571	654	765	826	—	—
Debit (travel)	357	395	493	509	576	637	646	644	—	—
Net (travel)	-9	91	-40	-5	-5	17	119	182	—	—
Net account for all economic sectors	-2276	-1914	-1727	-860	-839	-1065	-1121	-1375	—	—
with Extra EUR 12										
Credit (travel)	166	232	217	235	272	312	365	393	—	—
Debit (travel)	126	139	174	178	202	224	227	227	—	—
Net (travel)	40	93	43	57	70	88	138	166	—	—
Net account for all economic sectors	76	792	810	953	1145	1254	1871	2405	—	—
with world										
Credit (travel)	514	718	670	727	843	966	1130	1219	1247	1365
Debit (travel)	483	534	667	687	778	861	873	871	1049	1046
Net (travel)	31	184	3	40	65	105	257	348	198	319
Net account for all economic sectors	-2200	-1122	-917	93	306	189	750	1030	1881	3245

Gross value added - ECU MIO	1986	1987	1988	1989	1990	1991
Market services as a whole	9 270	9 466	10 013	11 555	12 966	13 567
Lodging, Restaurants and catering	560	575	585	618	703	778
Total of branches	23 822	24 207	25 916	29 062	31 547	32 960

Arrivals of visitors at the borders ('000)*



Arrivals of visitors at the border by country of residence - 1993



These remarkable results are in particular due tourism expenditures of the United Kingdom and North America, which for 1993 made up 33% and 13% of total tourism receipts respectively.

Ireland conducts two thirds of its international travel exchanges in EU currencies. In 1991 68% of its receipts came from EU countries and Ireland spent 74 % of its total travel expenditures in EU countries. This is hardly surprising since more than two thirds of foreign visitors to Ireland come from EU countries (81% in 1991) and 84% of trips abroad made by the Irish are to EU countries.

Thus, the tourism sector makes an important contribution to the Ireland's Balance of Payments, which from 1987 to 1991 has enjoyed a largely positive net current account.

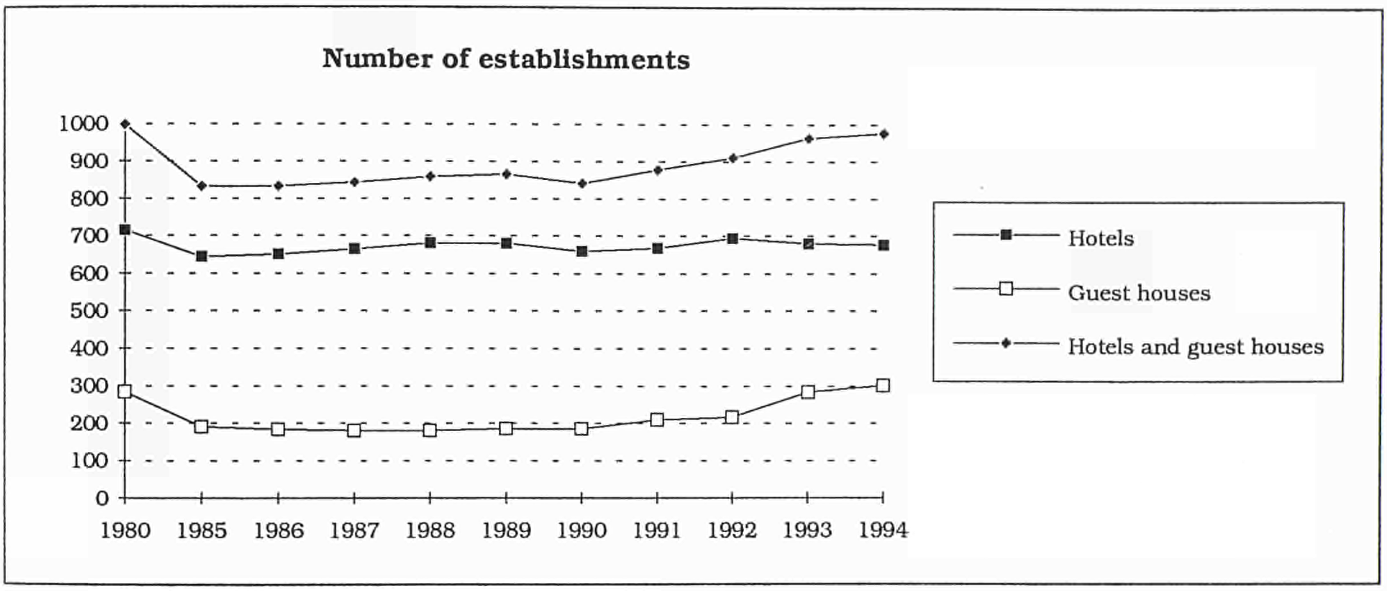
Tourism is an important source of employment in Ireland. It is estimated that in 1992 46 0(jobs depended directly on tou ism, representing 3% of the tot active population. Using i put/output analysis methods, tl Irish Tourist Board (Bord Fáilt has estimated that tourism Ireland supports 91 000 jobs (tourism related sectors and jol supported by the spin-off effe of tourist spending througho the economy).

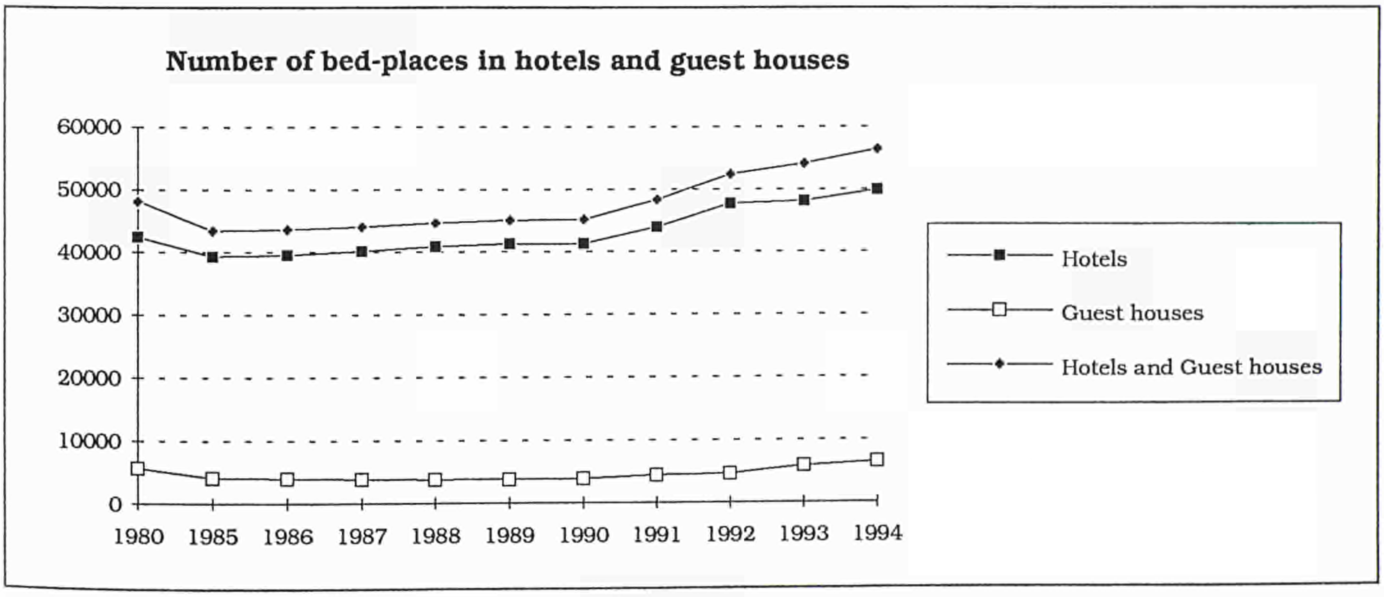
Whereas unemployment has i creased in Ireland - affectir 209 000 persons in 1991, i.e 16% of the total active popul tion - tourism is one of the ra sectors of activity that registe small but regular increases employment.

The tourism sector also makes significant contribution to Ir land's economic production. A though no exact figures are avai able to assess the importance the production of the touris sector as a whole in the ecor omy, figures on the lodging ar catering sector present a parti but viable indicator of this pe formance.

The gross value added (at mark prices) of the lodging and cate ing sector considerably increase from 1986 to 1991. In 1989 rose by over 5% compared to tl previous year, and over 13% 1990 and 10% in 1991. In 19 the production of the lodging ar catering sector in terms of gro value added attained EC 778 million, representing nearly % of market services as a who and over 2% of total value adde of all branches of the economy. Indeed, Tourism has been re ognised by the Irish governme as a key sector for Ireland's economic growth. Since 1988, Bord Fáilte has developed a "strategy for growth", including a product strategy to simulate development of an extended range of high quality tourism projects. The strategy was highly dependent on an improved investment climate stimulated by the government and the extension to tourism of new funds, mainly the European Regional Development Fund (ERDF), the Business Expansion Scheme (BES), and the International Fund for Ireland (IFI). The government also took measures to support the overall strategy, including the liberalisation of air fares and lowering of inflation leading to improved competitiveness. Funds have been pumped into private and public capital investment and also into manpower and training. The type of tourism products invested into include inland waterways, angling, touring routes, culture and heritage, leisure facilities, coastal marinas, golf and conference facilities. The BES was extensively used in the late 1980's, particularly for developing tourism accommodation.

Bord Fáilte has indicated that in recent years on average £154 million per annum has been invested in tourism related products mainly through ERDF and BES funding. In 1992 total investment in Ireland amounted to £4 618 million of which tourism accounted for £154 million (3.3%).





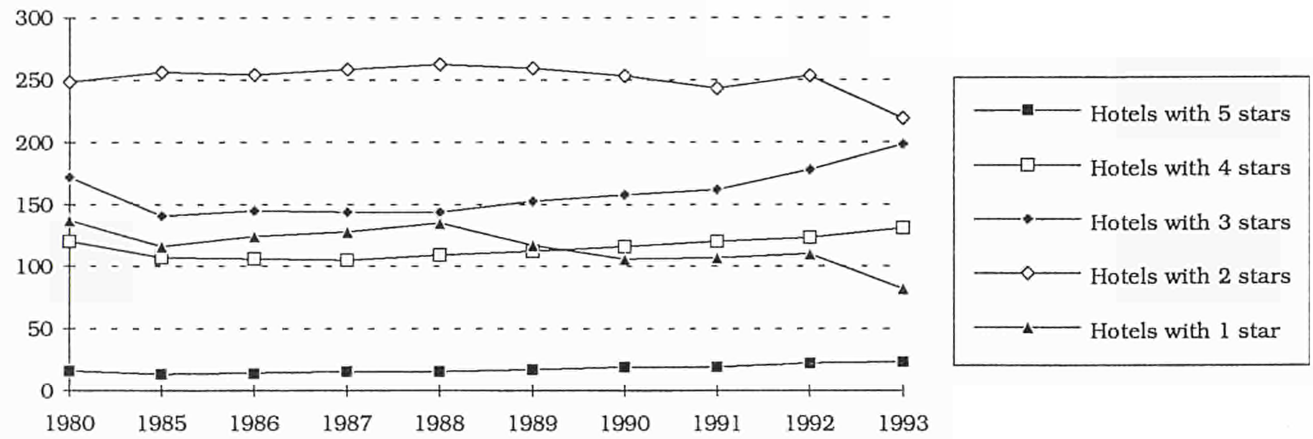
Tourism Supply

The number of hotels and guest houses in Ireland saw minor ups and downs during the second half of the mid eighties, but in the beginning of the nineties it grew considerably. Between 1990 and 1994 the number increased by 14% to total 977 establishments. This growth in supply is mainly due to the increase in the number of guest houses (301 in 1994), which grew by 39%. The principal growth factors were the emergence of new guest houses and the re-classification of certain establishments which had previously been trading as Bed & Breakfasts.

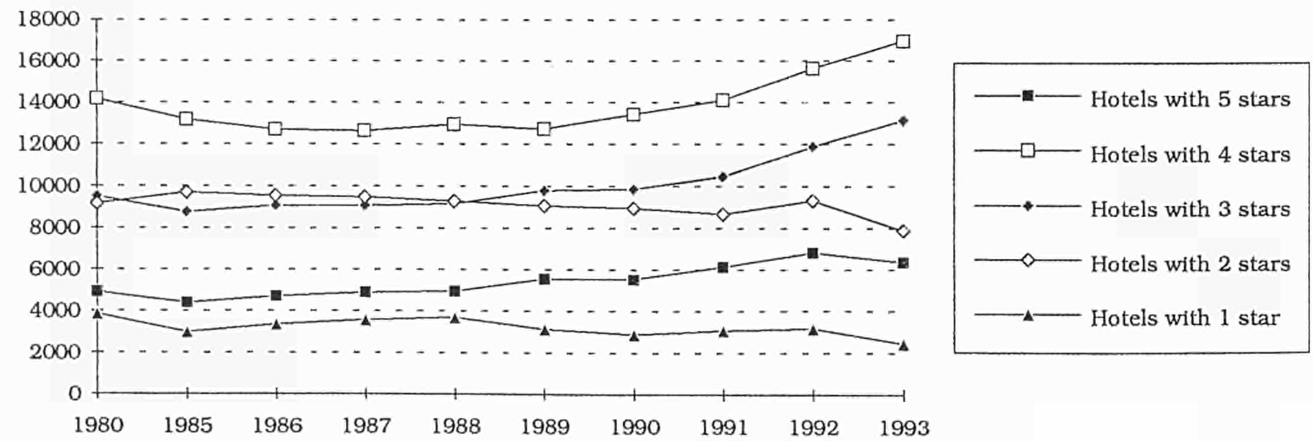
During the eighties the number of bed-places in hotels and guest houses followed a similar pattern to the number of establishments. In the beginning of the nineties, the number of bed-places grew even more significantly than the number of establishments, offering a total of 56 293 bed-pla in 1994. Hotels tended to pand their capacity and betw 1990 and 1994 bed-places creased by 17%, compared to increase of 3% in the number hotel establishments. Gu houses increased their capac by 40% during this period, atta ing their highest level ever corded (6 493 bed-places).

There has been a trend in Irel to improve the quality of services provided by hotels.

Number of hotels according quality



Number of bed-places in hotels according to quality



deed over the past decade it is the five, four and three star hotels that have tended to increase in number as the number of two and one star hotels experienced relative decline.

The largest growth has been in three star hotels which numbered 141 establishments in 1985 and grew to number nearly 200 in 1993. This may in part be attributed to the upgrading of some two star hotels, as over this last period, the number of two star hotels has been falling (from 256 to 219 establishments). In terms of quantity two star hotels remain, however, the most plentiful. In view of the aim to increase quality it is one star hotels that have the most declined. In 1985 they numbered 116 and although they picked up in mid eighties, by 1993 they had fallen to 82. This would tend to indicate that the demand for one star hotels is falling as tourists are offered equivalent services at lower prices in similar establishments such as guest houses and Bed & Breakfasts.

Transport infrastructure

Railways

	1985	1986	1987	1988	1989	1990	1991	1992
Length of lines (km)	1 944	1 944	1 944	1 944	1 944	1 944	1 944	1 944
Passengers carried (Mio.)	20	22	25	24	24	25	26	26
Passenger-km (Mio.)	1 023	1 075	1 196	1 180	1 220	1 226	1 290	1 226

Road

	1985	1986	1987	1988	1989	1990	1991	1992
Motorways (km)	8	8	8	8	8	32	32	32
Stock of buses and coaches	3 295	3 422	3 521	3 701	3 834	4 047	4 388	4 557
Cars (1000)	715	717	743	756	780	797	838	864
Cars per 1000 inhabitants	202	203	210	214	222	228	238	245

Aviation

	1985	1986	1987	1988	1989	1990	1991	1992
Aircraft movements - all (1000)	73	80	87	105	120	130	120	—
Total passengers (1000)	4 119	4 424	5 239	6 354	7 195	7 846	7 466	—

Four star hotels have the largest capacity to accommodate tourists (16 969 bed-places in 1993). As the number of establishments rose between 1990 and 1993, so has the number of bed places (21%). Three star hotels offer the second largest capacity with 13 154 bed-places in 1993, and between 1990 and 1993 increased their capacity by a quarter. The number of bed-places in five star hotels increased by 13% during this same period.

Contrary to the situation of high star rated hotels, the number of bed-places in two star and one star hotels fell by 13% and 18% respectively between 1990 and 1993.

Other types of tourist collective accommodation form part of the supply offered to tourists. Bed & Breakfast and self catering accommodation are, respectively, the second and third most important type of tourist accommodation in terms of capacity. In 1993 there were 3869 Bed & Breakfast establishments offering some 36 000 bed-places and 4 236 self catering premises offering 25 000 bed-places. Moreover, there were 124 camping sites holding a capacity of 32 000 bed-places and 150 hostels supplying 8 000 bed-places.

Transport infrastructure did not experience any major changes throughout the eighties and beginning of the nineties in Ireland. Nevertheless, emphasis has been placed on making Ireland more easily accessible for overseas visitors.

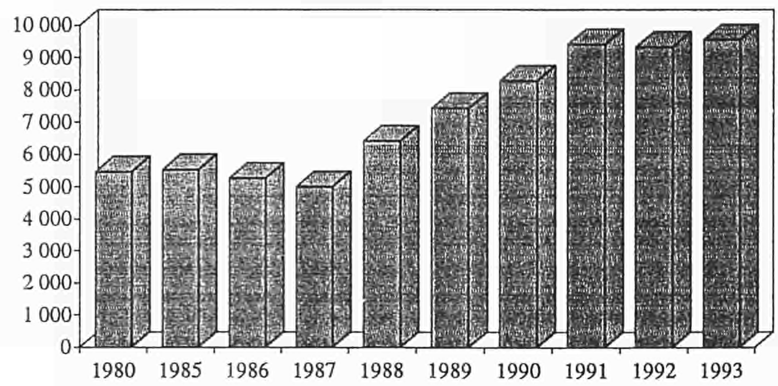
The creation in 1990 of the ring motor way around Dublin, however, has contributed to ease traffic in the capital and assist tourists in gaining easier and quicker access to Ireland's main airport centre. The number of tour operators, scheduled services and charters servicing Ireland have all increased. Charter series from mainland Europe, for example, comprised over 100 000 seats in 1992 compared to 40 000 in 1989.
Pan America and Delta Airlines opened new regular lines to Shannon in 1986, which have contributed to favouring the incoming traffic from the south and the west.

Most extra European inbound passengers (75%) and over half of EU residents come to Ireland by plane. Arrivals of non-resident tourists by plane more than doubled between 1985 and 1990 from 917 000 to 1.9 million. In 1990 arrivals increased by 12% compared to 1989, and although arrivals were affected by the economic recession and Gulf crisis in 1991 and fell by 7%, the impact was short lived. By 1993 arrivals of non residents by plane surpassed the 2 million mark.

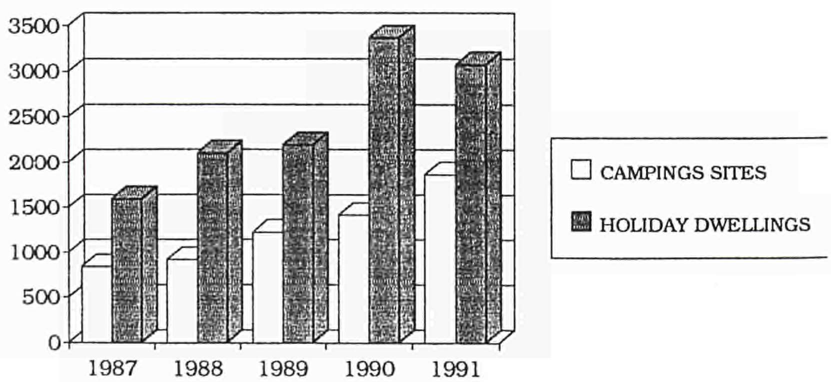
As citizens tend to travel more, rail passenger traffic has steadily risen over the past decade and totalled 1 226 million passenger-km in 1992. Likewise travel by car is increasing as the number of cars per inhabitants has increased over this period. In 1985 there were 202 cars per 1 000 inhabitants and in 1993 there were 253. The stock of buses and coaches has also considerably increased between 1980 and 1992.
Tourism boat and ferry transport is mainly linked to passenger transport between Ireland and Great Britain and to a lesser extent with France. The main passenger ports in Ireland are Dublin and Rosslare, which amount to 92% of total sea passenger transport.

In 1993 1.3 million non-reside tourists came by the princip seaports, and over 40% of E non resident arrivals were t seaports. It is deemed possib that via England, Ireland could the medium to long term als benefit from the traffic of tl channel tunnel.

Nights spent by non-residents in hotels and similar establishments ('000)



Nights spent by non-residents in other collective tourist accommodation ('000)



Tourism Demand

The tourism season in Ireland is during the summer, when tourists can count on fairly mild weather conditions. It begins in May and continues until the end of September, with net occupancy rates attaining over 70% (1991) in hotels.

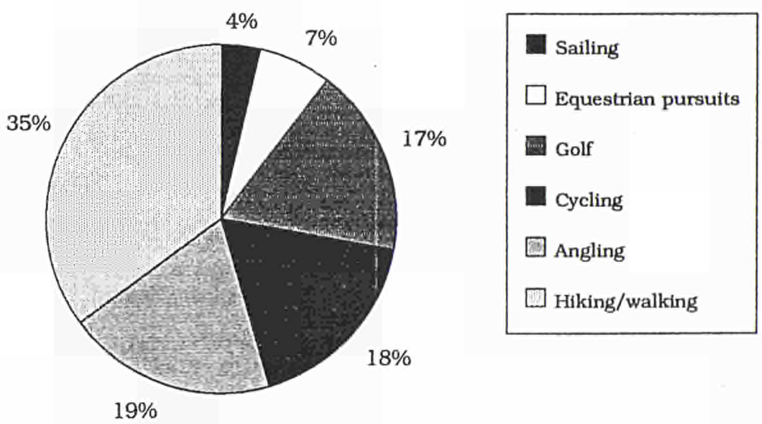
Overnight stays by non residents[1] in all types of accommodation picked up in 1992 (33.6 million), after having suffered a drop in 1991 (-1.2%) and in 1993 totalled 35.1 million overnight stays. The largest share of overnights stays are due to tourists from Great Britain (43%) with the second largest share being made up of overnight stays of North American residents (13%).

Arrivals and overnights stays in hotels and guest houses have seen in general year to year positive growth rates, as more and more foreign tourists are attracted to the splendour of the green scenery of Ireland, its culture, its history and heritage and its welcoming people. 1986 and 1986 were not very favourable years, but between 1988 and 1991 overnight stays increased at unprecedented rates. The highest year to year increase occurred between 1987 and 1988 (28%), but satisfactory rates were achieved in 1989 (16%), 1990 (11%) and 1991 (14%). In 1992 overnight stays fell slightly, mainly due to the decline in the length of stay of European tourists. Data for 1993 shows overnight stays by non residents reaching new heights (9.5 million).

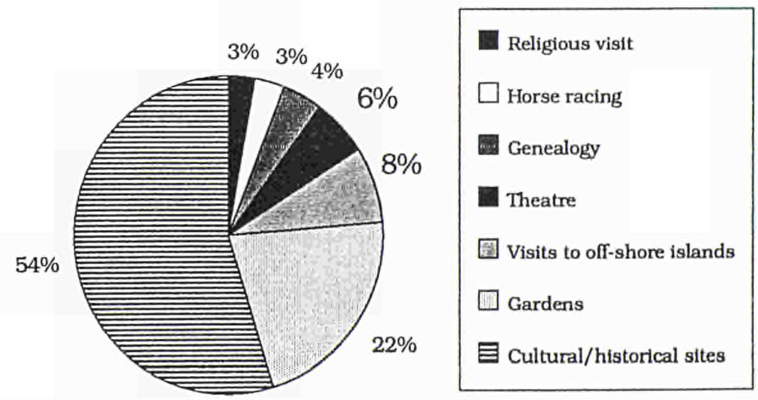
Again, GB citizens and North American citizens are the most frequent guests to stay in hotels and guest houses. In 1993 GB residents represented nearly 35% of all overnight stays of non residents, and North American citizens represented nearly 22%. German and French tourists also make up a fair share (11% and 10% respectively), followed by Italians (6%).

The main purpose of the trips of non residents to Ireland is for a holiday and this purpose is becoming more important as time passes. In 1987 only 35% of all trips to Ireland were for holidays and 41% were to visit friends and

Most popular active pursuits of non-resident holidaymakers (1993)



Most popular passive pursuits of non-resident holidaymakers (1993)



[1] It should be noted that data on arrivals and overnight stays of non residents are derived from travel surveys on non-residents visiting Ireland, therefore the results cannot be compared with those of member states who obtain data on guest flows through tourism accommodation registers.

relatives. This trend is now changing and in 1993 43% of trips were for holidays and only were for 25% to visit friends and family. It would seem that Ireland has been successful in attracting new types of tourists. Naturally there is a certain proportion of non-resident tourists, particularly from Great Britain that take the opportunity to do both (200 000). Business trips also represent a fair share of tourism to Ireland (19% in 1993) and other purposes such as sports (particularly fishing and golf), cultural and religious motivations have all increased in importance.

Ireland also benefits from a strong domestic demand market. As well as the geographic factor, the Irish enjoy visiting their own country. Unfortunately no recent official data is available on arrivals and overnights stays of residents in tourism accommodation, as registration is not compulsory. Nevertheless, in 1988 Irish residents made 3.6 million holiday trips of which only 34% were made abroad.

In 1991 the Irish made 5.8 million pleasure trips (e.g. holidays, visits to friends and family, others..), of which 83% were made in Ireland. Indeed, as the number of holiday trips of Irish tourists has been rising it is mainly domestic tourism that has profited from this increase in the propensity to travel. Expenditures of Irish tourists in Ireland have risen steadily over the eighties and experienced high year to year increases from 1990 to 1992. Expenditure abroad by Irish residents showed no real increase at the beginning of the nineties, but grew by 12% in 1992 and 5% in 1993.

After the period of recession which hit Europe and other industrialised countries at the beginning of the nineties, it is estimated that tourism demand will reach new heights and continue to be a valuable stimulator of economic activity.

Tourist expenditure - £ MIO:	1980	1985	1989	1990	1991	1992	1993
- of residents in the country	169	269	331	413	505	652	642
- of residents abroad	283	402	698	701	699	797	835
- of non residents in the country	369	685	991	1139	1213	1229	1367

General Situation and Key Indicators: Development and Impact of Tourism

Italy is traditionally one of Europe's most popular tourist destinations. In addition to the typical Mediterranean sea resorts, it offers Alpine sites for winter sports and summer vacations. Italy is also a major destination for cultural tourism.

In the early 1980s Italy was the leading country for international tourist arrivals in Europe. Since then inbound tourism has stagnated and Italy has fallen into fifth place. The slowdown is the result of changes in the tourism market due to general economic, social, and cultural conditions and Italy's poor environmental record (algae and mucilage invasion of the northern Adriatic sea) and infrastructure problems (inadequate alternatives to road transport, limited access to cultural attractions).

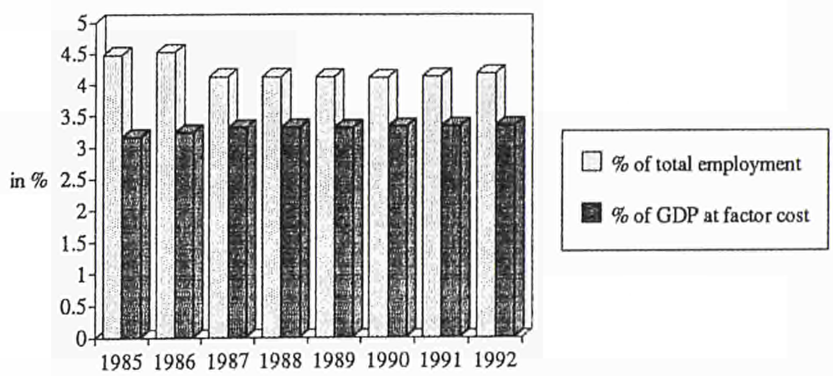
Meanwhile, Italy has also become increasingly important as a tourism-generating country.

Methodological changes introduced in 1990 for establishing the balance of payments somewhat distort the overall picture; however, certain general trends can be outlined. The net travel balance has always been clearly positive. However, after its peak in 1985 it declined until 1991, then it started to improve again. Monetary flows are stronger with the Member States

Travel (tourism) in the Balance of Payments
(million ecus)

	1980	1985	1986	1987	1988	1989	1990	1991	1992	1993
with EUR 12										
Credit (travel)	4 590	7 246	6 807	7 319	7 278	7 570	10 508	10 869	—	—
Debit (travel)	1 020	1 924	2 306	3 087	4 007	4 988	7 953	7 262	—	—
Net (travel)	3 570	5 322	4 501	4 232	3 271	2 582	2 555	3 807	—	—
Net account for all economic sectors	-549	-1 253	-2 371	-3 343	-5 002	-8 814	-8 103	-10 044	—	—
with Extra EUR 12										
Credit (travel)	1 830	3 771	3 242	3 239	3 223	3 316	5 034	4 036	—	—
Debit (travel)	353	556	661	847	1 064	1 163	2 934	2 163	—	—
Net (travel)	1 477	3 215	2 581	2 392	2 160	2 152	2 101	1 873	—	—
Net account for all economic sectors	-6 237	-3 693	4 972	2 045	1 084	-1 388	-4 094	-8 077	—	—
with world										
Credit (travel)	6 419	11 017	10 049	10 559	10 501	10 885	15 542	14 906	17 678	18 840
Debit (travel)	1 374	2 480	2 967	3 934	5 070	6 151	10 887	9 425	13 903	12 005
Net (travel)	5 045	8 537	7 082	6 625	5 431	4 734	4 655	5 480	3 775	6 835
Net account for all economic sectors	-6 787	-4 945	2 601	-1 298	-4 384	-10 202	-12 197	-18 121	—	—

Accommodation establishments and other tourist activities as part of all economic activities



of the European Union (EU) than with non-EU countries. The travel balance with non-EU countries shows a high debit after 1990, which indicates a rise in outbound tourism.

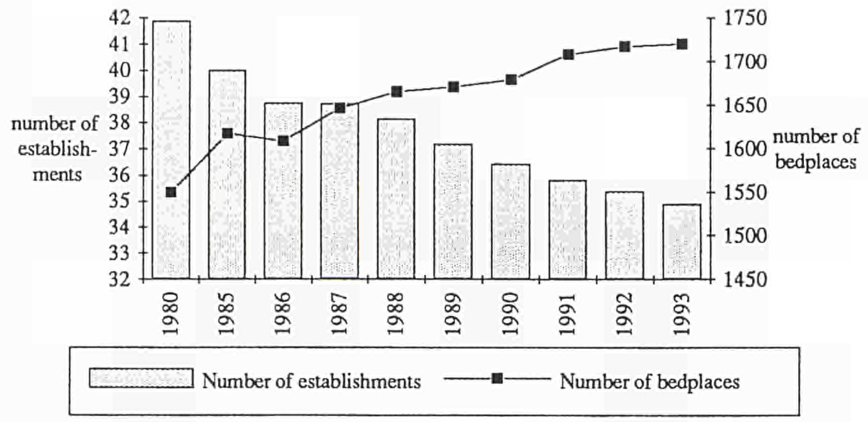
Despite general stagnation, the Italian tourism industry remains competitive and continues to play an important role in the economy. Hotels, restaurants, cafés, and travel agencies, which hold a significant share in the industry, contributed 3.4% (at factor cost) to the gross domestic product (GDP) and 4.2% to national employment in 1992. These figures include only direct economic contributions.

Less conservative estimates that attempt to cover all tourism- related activities and spin-offs indicate that 3.2 million jobs (almost 14% of the total labour market) depended on the tourism industry in 1994. They also reveal that tourism generated value-added of about ECU 120 thousand million (approximately 12.5% of the GDP).

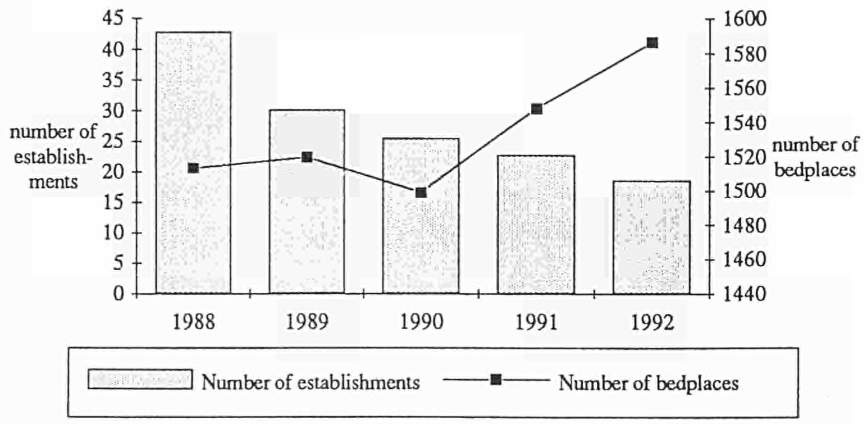
Tourism Supply

Two apparently contradictory trends are observed in tourism supply: a decline in the number of accommodation establishments and a rise in the number of bedplates. They indicate a general trend towards concentration and growth in enterprise size for hotels and similar establishments, and supplementary accommodation establishments.

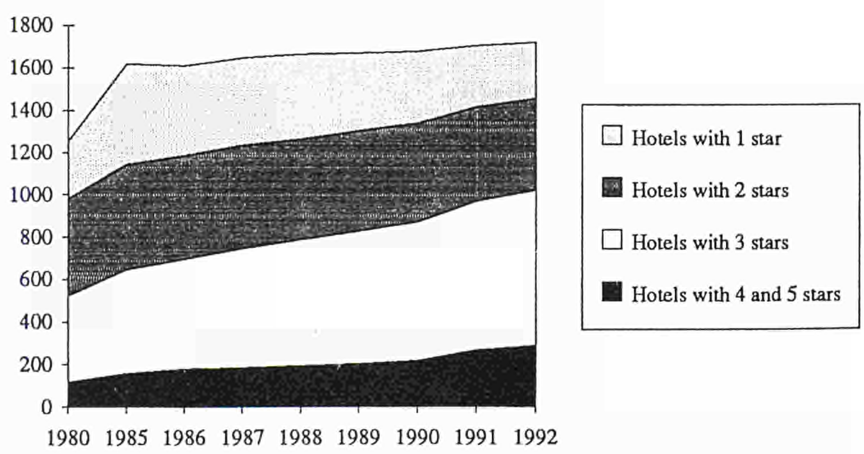
Hotels and similar establishments: number of establishments and number of bedplaces ('000)



Supplementary accommodation establishments: number of establishments and number of bedplaces ('000)



Bedplaces in hotels - classification by star ('000)



The number of hotels and similar establishments fell steadily by 13% between 1985 (39 993) and 1993 (34 870). Bedplace supply grew during the same period from 1.61 million to 1.72 million (6.4%).

The total number of supplementary accommodation establishments declined by 56% between 1988 (42 496) and 1992 (18 551), whereas the number of bedplaces grew from 1.51 million to 1.59 million (5%). Based on 1992 data, campsites and tourist villages had the highest capacity (1.26 million bedplaces); all other types of accommodation (eg, social tourism accommodation establishments) were statistically of minor importance.

Similar to developments in many other European countries, accommodation establishments in Italy increasingly offer higher quality. The number of three- to five-star hotels grew by 32% during 1985-1992. Two-star hotels remained stable, while one-star hotels fell sharply (-44%).

Two- and three-star hotels account for the bulk of accommodation supply. Luxury hotels include mainly four-star establishments; five-star hotels are rare in Italy. Despite strong negative growth, one-star hotels are still more numerous than in most other European countries.

The number of restaurants (approximately 90 000) and cafés (approximately 140 000) has remained almost stable since 1985. The number of travel agencies

Transport infrastructure

Railways

	1980	1985	1986	1987	1988	1989	1990	1991	1992
Length of lines (km)	16 133	16 183	16 035	15 973	16 016	16 030	16 066	16 066	—
Passengers carried (Mio.)	381	364	393	394	410	419	429	430	441*)
Passenger-km (Mio.)	39 587	37 401	40 500	41 395	43 343	44 443	45 512	46 427	47200*)

Road

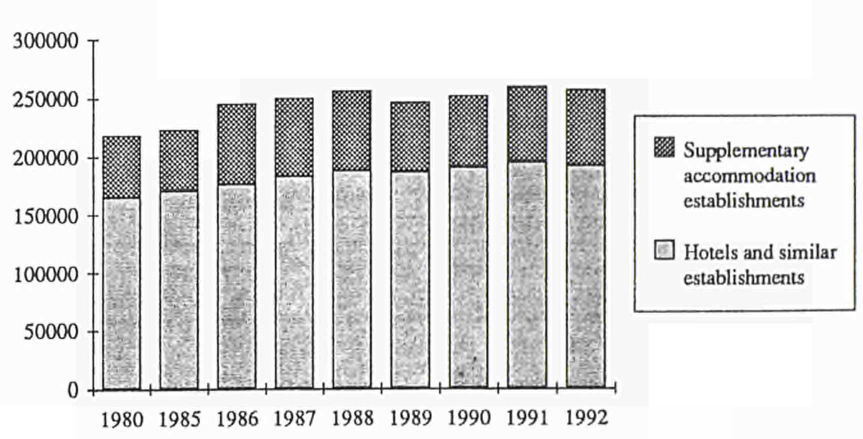
	1980	1985	1986	1987	1988	1989	1990	1991	1992
Motorways (km)	5 900	5 955	5 997	6 091	5 999	6 193	6 185	6 214	6239*)
Stock of buses and coaches	58 149	76 296	77 891	74 114	75 820	76 313	75 550	77 700	—
Cars (1000)	17 686	22 495	23 495	24 320	25 290	25 267	27 528	28 519	29200*)
Cars per 1000 inhabitants	343	434	453	423	440	456	477	494	514

Aviation

	1980	1985	1986	1987	1988	1989	1990	1991	1992
Aircraft movements - all (1000)	404	439	472	494	629	667	688	654	685*)
Total passengers (1000)	26 176	32 802	33 697	37 416	41 068	43 299	47 975	44 775	49125*)

*) provisional data

Nights spent in hotels and similar establishments and in supplementary accommodation establishments ('000)



grew from 3 488 in 1985 to 5 436 in 1992.

Data on the transport sector indicate a general increase in infrastructure supply and passenger demand.

The strongest growth rates were recorded for air transport, except for a slump in 1991 due to the Gulf crisis. Plane movements increased from 439 000 in 1985 to 685 000 in 1992, and the number of passengers grew by 50%, from 32.8 million to 49.1 million.

Although the length of the railway network remained unchanged, the number of passengers and passenger kilometres has grown steadily since 1985.

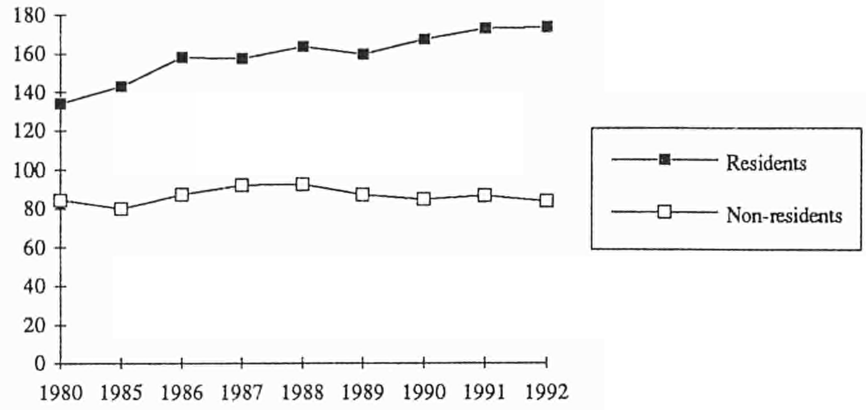
The motorway network continued to expand and reached 6 239 km in 1992. The number of cars increased by 30% during 1985–1992. The ratio of 514 cars per 1 000 inhabitants in 1992 was among the highest in Europe.

Tourism Demand

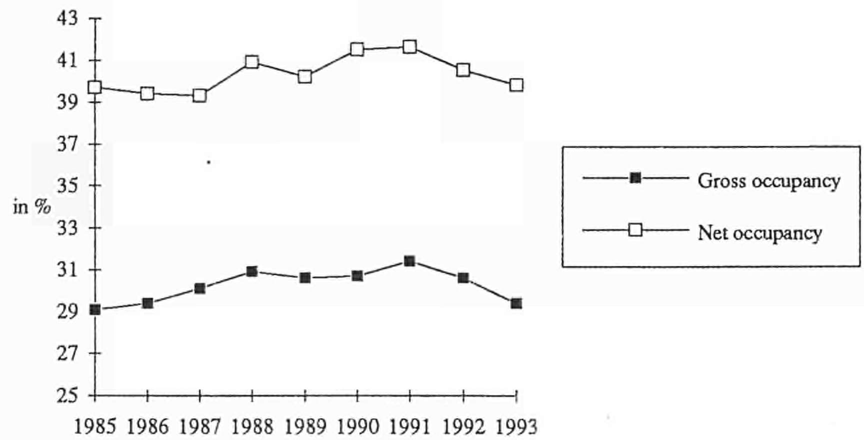
The number of nights spent in accommodation establishments increased from 1980 until 1988 (260 million nights). It fell in 1989 and has shown fluctuating growth since then. Throughout this period, hotels and similar establishments maintained a share of 75% of the total.

In 1992 the number of overnights for residents was about 170 million, compared with 80 million

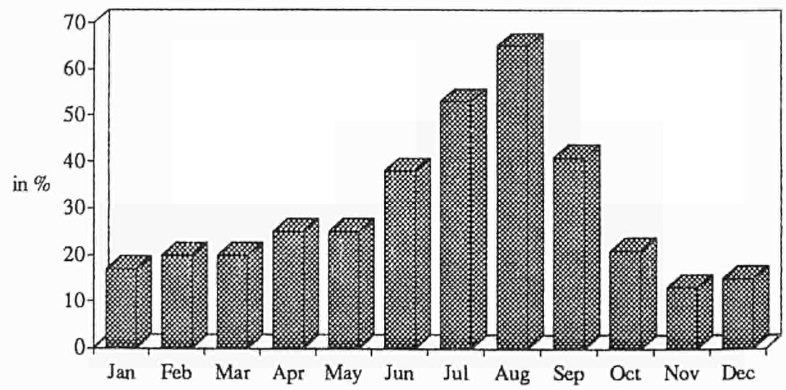
Nights spent by residents and non-residents in accommodation establishments (in Mio.)



Occupancy rates in hotels and similar establishments



Monthly gross occupancy rates in hotels and similar establishments, 1993



overnights for nonresidents. Resident demand grew continuously during 1980–1992, while nonresident demand declined from 39% in 1980 to 33% in 1992. Italy has not been able to maintain its position as a tourist destination in an expanding market for international tourism.

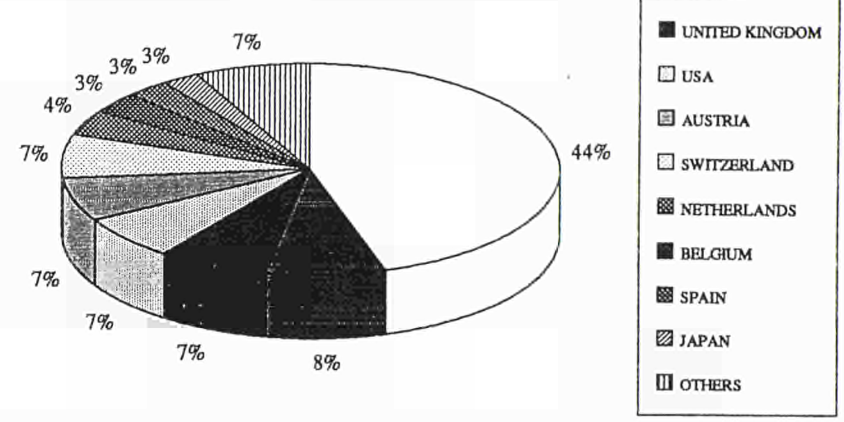
Since 1985 net occupancy rates for hotels and similar establishments have remained between 39% and 41%. Gross occupancy rates followed the same pattern as net rates, but they were an average 10% lower. The large difference between net and gross occupancy can be attributed to adaptation of hotel establishments to the marked seasonal shifts in accommodation demand.

A monthly breakdown of gross occupancy rates for 1993 showed strong concentration of demand in July and August. The gross occupancy rate for hotels and similar establishments was 65% in August, but it fell below 20% during November–January.

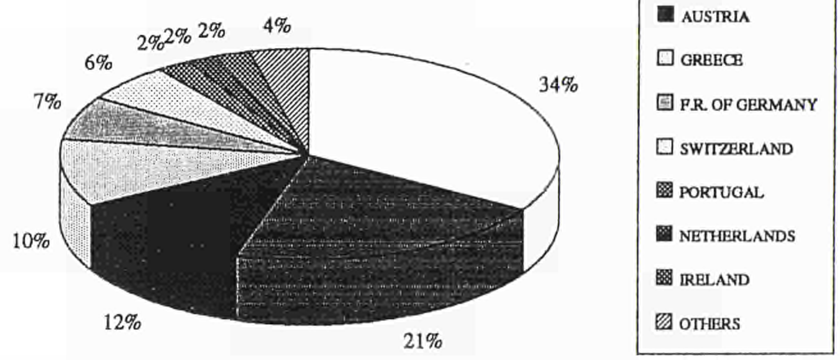
The largest share of nonresident demand, based on the number of overnights, was held by tourists from Germany (44%) in 1992. France (8%), the United Kingdom, Austria, and Switzerland (each 7%) together accounted for 29%. Italy's popularity as a destination for American tourists is seen from their relatively high share of 7%. Japanese tourists also form an important group of non-European visitors.

The two most popular foreign destinations for Italian residents are France and Spain; in 1992 they accounted for 55% of the total overnights by Italians travelling abroad. Austria and Greece together accounted for 22%. Germany ranked fifth (7%) and Switzerland, sixth (6%). The six countries together accounted for about 90% of the nights spent by Italians abroad. (No data are available for nights spent by Italians in the United Kingdom.)

Nights spent in accommodation establishments by non-residents according to nationality, 1992



Nights spent by Italians in hotels and similar establishments abroad, 1992*



* Data for the UK not available

General Situation and Key Indicators: Development and Impact of Tourism

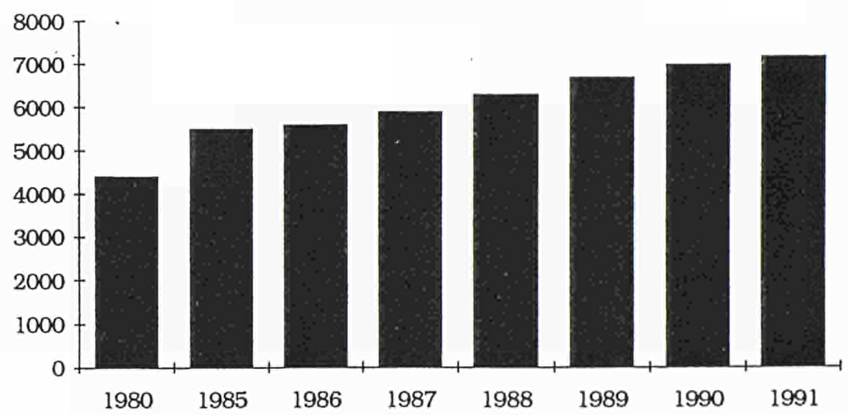
The Luxembourg government's recent policy decision to develop the tourism industry has led to the organization of various promotional activities (establishment of tourism offices in other countries, organization of fairs and exhibitions, production of brochures) by the Ministry of Tourism. The National Tourist Office has aimed its efforts at attracting quality clientele and ensuring year-round tourist inflow.

Although tourism is a dynamic sector of Luxembourg's economy, it has a moderate impact on the labour market. Hotel, restaurant, and caf, enterprises represent a large part of tourism activity and accounted for 4% of the total wage earners' market in 1991, which grew by 25% during the 1980s. The share of lodging and catering services in total gross value-added (at market prices) of market services increased by 25% during 1985–1990. Turnover of lodging and catering establishments, and travel agents multiplied almost 2½ times as a result of extensive growth during the 1980s.

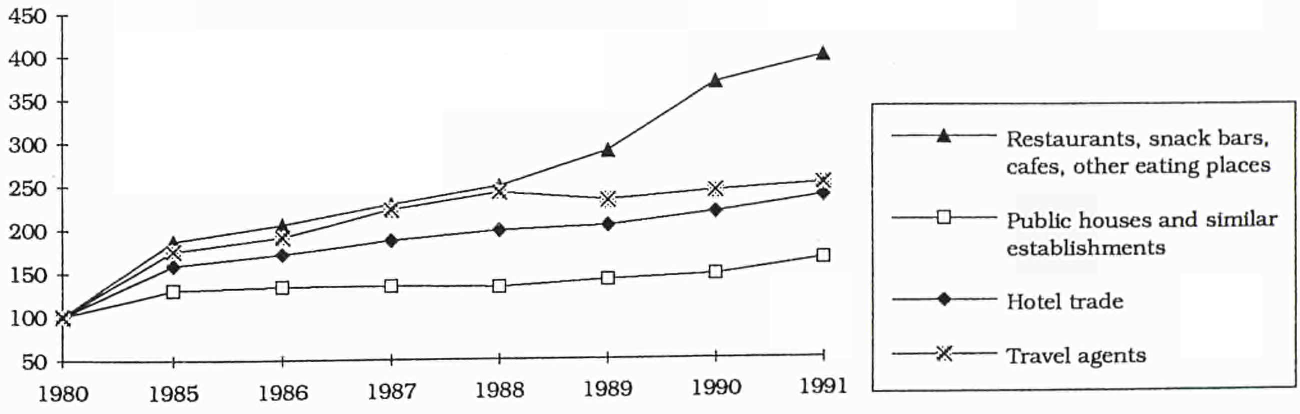
The balance of payments figures concern the entire Belgo-Luxembourg Economic Union (BLEU). As Luxembourg's share is comparatively small, it is difficult to assess the share of travel (tourism) in its balance of payments.

Inbound visitors mainly come from Member States of the European Union (EU), they accounted for 82.9% of nights spent in accommodation establishments. (Visitors from Belgium, France, Germany, and The Netherlands accounted for 78.8% of the total.) Overnights by visitors from Portugal grew 14-fold between 1980 and 1992 to 2.46% of the total in 1992. The United States held the largest share (2.5%) of accommodation demand among non-European

Wage and salary earners in hotels, restaurants, cafés (HORECA)



Turnover (HORECA/TA), in national currency (1980=index 100)



countries. Residents accounted for only 12.6%. Until 1989 the average annual increase in the number of overnights was not significant; thereafter it rose by 12%.

The total number of inbound visitors declined by 0.9% in 1990, but it rebounded (+6.7%) the following year.

Tourism Supply

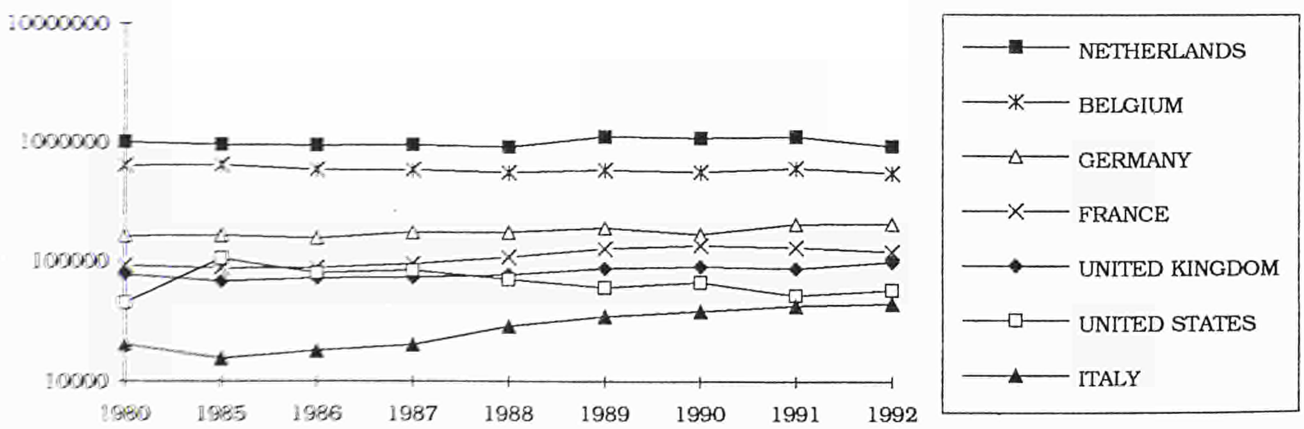
The number of hotels and similar establishments dropped by 16.1% between 1980 and 1985 (hotels, –7.8%; similar establishments, –26%); the number of rooms, however, fell by only 1.5%. Between 1985 and 1991 the number of hotels and similar establishments increased slightly by 3.3% (hotels, 2.9%; similar establishments, 4%). The rise in the number of rooms was higher for hotels (5.1%) than for similar establishments (1.7%). Hotels focus on developing capacity; the

Travel (tourism) in the Balance of Payments (BLEU*)
(Mio. ecus)

	1980	1985	1986	1987	1988	1989	1990	1991	1992
with EUR 12									
Credit (travel)	911	1296	1521	1998	2164	1906	2162	2291	3534
Debit (travel)	1576	1777	1991	2556	2786	2574	2986	3380	5457
Net (travel)	-665	-481	-470	-558	-622	-668	-824	-1089	-1923
Net account for all economic sectors	187	-72	743	3520	3969	6247	6536	7103	—
with Extra EUR 12									
Credit (travel)	394	902	723	720	760	837	808	645	890
Debit (travel)	788	933	977	952	1175	1345	1257	1119	1659
Net (travel)	-394	-31	-254	-232	-415	-508	-449	-474	-769
Net account for all economic sectors	-2488	-208	1019	-501	-699	-1981	-2243	-2862	—
with world									
Credit (travel)	1305	2198	2244	2718	2924	2743	2970	2936	4424
Debit (travel)	2365	2710	2968	3508	3961	3919	4243	4499	7116
Net (travel)	-1060	-512	-724	-790	-1037	-1176	-1273	-1563	-2692
Net account for all economic sectors	-3547	-280	1762	3019	3270	4266	4293	4241	—

* BLEU: Belgo-Luxembourg Econnomic Union

Main visitors trends by country of origin (nights in accommodation establishments)



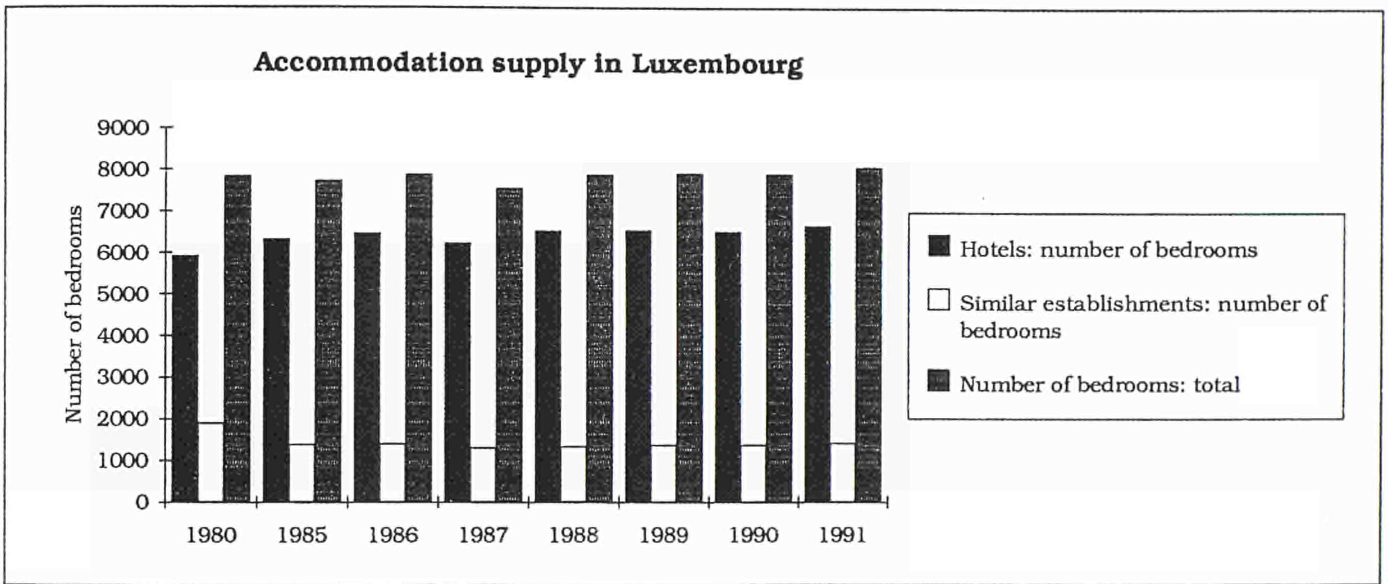
eurostat

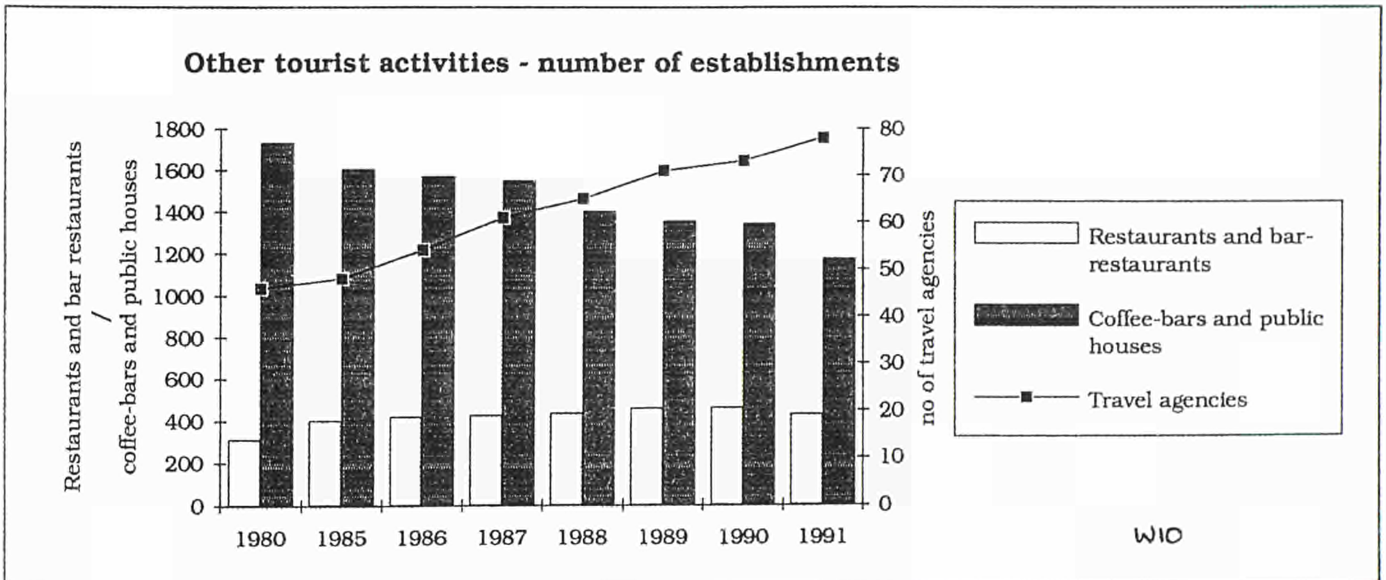
average number of rooms per hotel grew from 23.1 in 1980 to 27.3 in 1991. The average for similar establishments remained at around 9 rooms during the same period.

Hotels are also moving upmarket. Between 1990 and 1992, the number of four-star hotels rose from 32 to 40 and that of three-star hotels from 49 to 60. Two-star hotels increased from 20 to 25 while one-star hotels remained at the same level.

Other tourism-related enterprises such as restaurants, travel agencies, and car rentals developed rapidly during the 1980s (restaurants, 37.4%; travel agencies, 39.1%). Coffee-bars and public houses, however, showed a decline of 32.4%.

The number of air passengers grew steadily until 1988 when it exceeded 1 million for the first time; this represents a 49.5% increase compared with 1980. However, in 1989, the number dropped by 5.6%, although plane movements increased by 5%. (Plane movements include cargo flights, which represent a significant proportion of flights from Luxembourg-Findel airport.) Since then the number of passengers has climbed steadily (+9.6% in 1990), except for a 7% drop in 1991 due to the Gulf crisis (plane movements, however, increased by 9.5%). In 1992 the number of both passengers and plane movements increased.





During the 1980s the number of railway passengers remained stable, but it fell by 9% in 1990. Network length remained unchanged.

The number of cars grew by 48.8% during 1980–1991. In 1993 there was 1 car per 1.9 inhabitants, compared with a ratio of 1/2.8 in 1980. Preference for road transport is confirmed by the 116% increase in the motorway network between 1980 and 1993.

Tourism Demand

Although Luxembourg may not appear to be a typical holiday destination, nonresident visitors accounted for 87.3% of the total number of overnights in 1992. However, growth rates during the 1980s were higher for residents (43.4%) than for nonresidents (8.5%). This growth can be attributed to the large number of business visits to the many EU institutions and banking enterprises located in Luxembourg.

Transport infrastructure

Railways

	1980	1985	1987	1988	1989	1990	1991	1992	1993
Length of lines (km)	270	270	272	272	272	271	271	275	___
Passengers carried (Mio.)	11	11	11	11	10	10	10	11	___
Passenger-km (Mio.)	246	229	216	223	224	208	*225	___	___

Road

	1980	1985	1987	1988	1989	1990	1991	1992	1993
Motorways (km)	44	58	58	64	75	78	78	95	95
Stock of buses and coaches	647	695	701	717	705	734	760	777	814
Cars (1000)	129	152	162	168	177	183	192	200	208
Cars per 1000 inhabitants	352	413	435	452	470	484	498	512	526

Aviation

	1980	1985	1987	1988	1989	1990	1991	1992	1993
Aircraft movements - all (1000)	55	62	49	60	63	63	69	*72	___
Total passengers (1000)	670	824	949	1002	946	1037	967	1092	___

* estimation

Resident demand for accommodation is still rather low as Luxembourg is geographically a small country and residents mostly travel abroad. But their share in accommodation demand is increasing; in 1992 it was 12.6% compared with 9.8% in 1980.

Fewer nights are spent in hotels and similar establishments than in supplementary accommodations such as holiday dwellings, campsites, and tourist villages. Despite the efforts of the National Tourism Office, visitors still tend to opt for lower priced accommodations.

In 1991 hotels and similar establishments accounted for 40.5% of the total number of overnights. The increase in overnights during 1980–1991 was 30.5% for hotels and similar establishments, compared with 16.8% for supplementary accommodations.

The main countries of residence of guests in accommodation establishments in 1992 were: The Netherlands, Belgium, Germany, France, the United Kingdom, Portugal, the United States, and Italy.

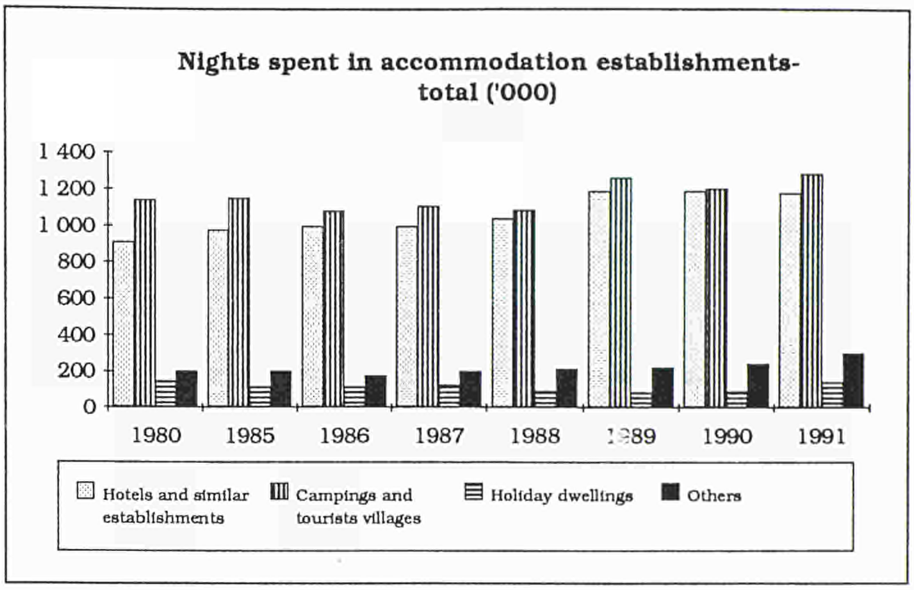
Dutch tourists rank first; in 1989, 1990, and 1991 the annual number of overnights spent by them exceeded 1 million. In 1992 the figure dropped by 15.4% to 948 334 overnights, close to the mid-1980s level.

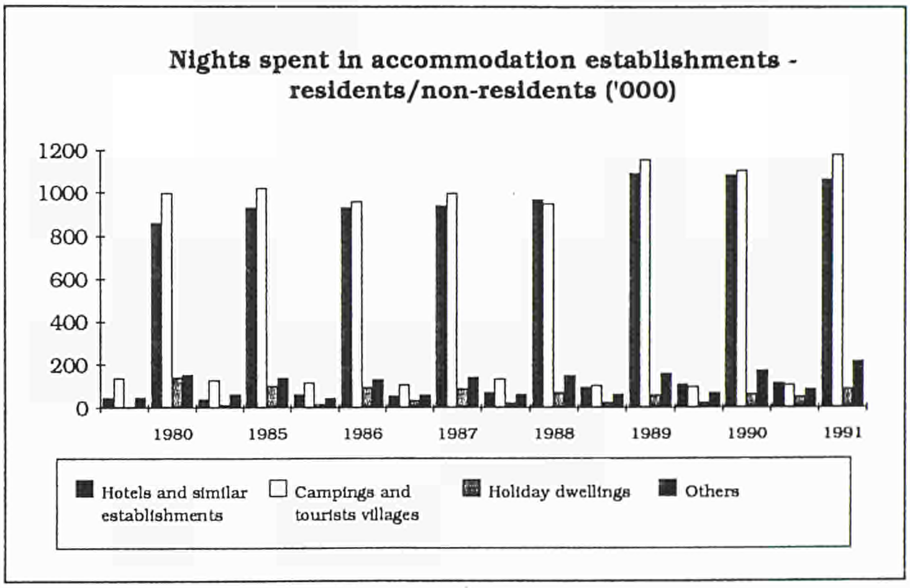
There are more visitors from the United Kingdom. In 1992 overnights exceeded 100 000, a 15.7% increase compared with the preceding year.

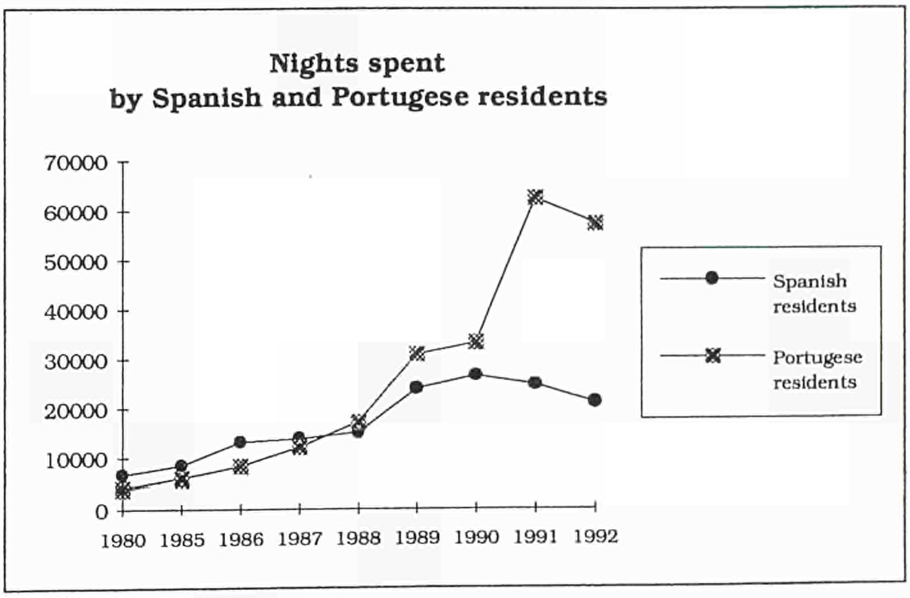
The entry of Spain and Portugal in the European Community in 1986 is one of the reasons for increased frequency of visitors from the two countries. The Portuguese also visit friends and relatives who have settled in Luxembourg; Portuguese immigrants make up 10.4% of the total population in Luxembourg.

Overnights by visitors from the United States show no regular pattern as they are linked to fluctuations in the dollar exchange rate.

Accommodation preferences vary with the country of residence. For example, supplementary accommodations (campsites, tourist villages, holiday dwellings) accounted for 81% of overnights by Dutch tourists in 1991. They also represented a high share in overnights by visitors from Portugal (77%), Australia and New Zealand (61.7%), Denmark (56%), and Belgium (51.4%). The most frequent visitors to Luxembourg's 127 campsites are Dutch tourists (more than 65% of overnights), followed by Belgians (22%). They are both concentrated in campsites of the Ardennes and Moellerdall regions.
The percentage of overnights in hotels and similar establishments is high for visitors from France, Germany, Greece, Italy, Japan, Spain, Switzerland, the United







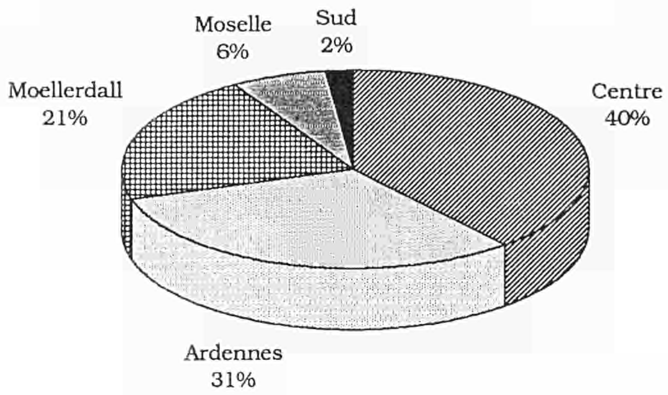
Kingdom, and the United States. It ranges from 64.4% for Germany to 92.1% for Japan.

Demand for hotels is highest in the Centre region (including Luxembourg city) because of business travel to the EU institutions and banking enterprises. Until 1985 the Ardennes region ranked highest for overnights (all accommodations), now it is the Centre region (40% of overnights in 1992, more than 50% of total visitors). The Ardennes and Moellerdall regions are popular locations for rural tourism; together the regions account for more than 80% of total campsite supply.

The average duration of stay (all 5 regions) for nonresidents in 1992 was 3.4 days, which indicates only a slight change compared with the 1980 average of 3.3 days. Duration in the Centre region is shortest because of the high proportion of business travel. The average is higher for residents, particularly for visits to the Moellerdall (18.3 days in 1992) and Moselle (16 days) regions. The higher average for residents can also be explained by higher frequency.

Duration of stay is longer than average for visitors from Portugal and other Benelux countries. For example, the average duration in 1992 for Portuguese residents visiting the Centre region was 6.4 days. Visitors from Portugal to the Moselle region also tend to stay longer—19.3 days in 1992 compared with 12.4 days in 1990. Average duration for visitors from Belgium and The Netherlands is 3.5 and 4.5 days, respectively. Irrespective of the country of residence, duration of stay always exceeds 5 days in the Ardennes region.

Overnight stays by touristic region in %, 1992

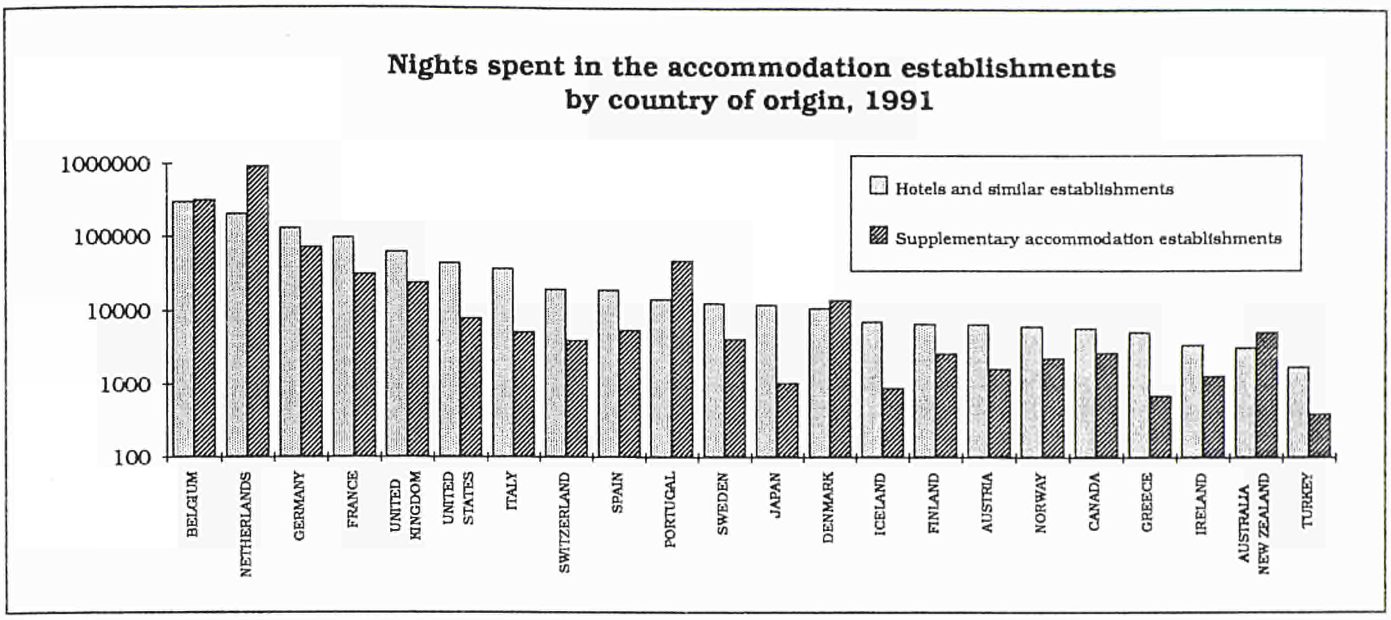


Average length of stay by non-residents (number of days)

	1980	1985	1990	1992
Centre	1.8	2.1	2.2	2.3
Ardennes	4.9	5.0	4.4	4.9
Moellerdall	4.9	5.0	4.2	4.9
Moselle	5.1	4.8	4.9	4.4
Sud	2.5	2.5	2.4	3.0
The five regions	3.3	3.4	3.2	3.4

Average length of stay by residents (number of days)

	1980	1985	1990	1992
Centre	2.2	2.7	4.6	6.0
Ardennes	6.1	7.4	5.7	8.0
Moellerdall	15.8	16.7	15.5	18.3
Moselle	24.4	22.1	17.2	16.0
Sud	4.2	3.1	3.5	7.3
The five regions	8.3	9.0	8.7	9.3


Nights spent in the accommodation establishments
by country of origin, 1991
Hotels and similar establishments
Supplementary accommodation establishments
1000000
100000
10000
1000
100
BELGIUM
NETHERLANDS
GERMANY
FRANCE
UNITED KINGDOM
UNITED STATES
ITALY
SWITZERLAND
SPAIN
PORTUGAL
SWEDEN
JAPAN
DENMARK
ICELAND
FINLAND
AUSTRIA
NORWAY
CANADA
GREECE
IRELAND
AUSTRALIA NEW ZEALAND
TURKEY

General Situation and Key Indicators: Development and Impact of Tourism

The Netherlands plays an important role in the European travel market both as a destination and as a country of origin. The four priority themes, as defined by the Dutch Ministry of Economic Affairs, for promoting the country as a tourist destination are interior waterways, cultural heritage, the coast, and urban centres. The main countries of residence of inbound tourists are the neighbouring countries Germany, Belgium, and the United Kingdom. The high departure rates for Dutch residents indicate significant demand on the national and international markets.

The overall balance of payments for travel (tourism) is negative. It deteriorated until 1987 (ECU –3 229 million) and since then it has levelled off at around ECU –3 000 million. More than two-thirds of the negative balance is due to tourism expenditure by Dutch travellers in the countries of the European Union (EU).

Travel (tourism) in the Balance of Payments
(million ecus)

	1980	1985	1986	1987	1988	1989	1990	1991	1992
with EUR 12									
Credit (travel)	925	1 321	1 473	1 583	1 675	1 928	2 062	2 352	2 775
Debit (travel)	2 190	3 118	3 470	3 844	3 951	3 967	3 798	4 397	4 834
Net (travel)	-1 265	-1 797	-1 997	-2 261	-2 276	-2 039	-1 736	-2 045	-2 059
Net account for all economic sectors	40 350	61 988	62 387	65 281	70 817	—	—	—	—
with Extra EUR 12									
Credit (travel)	272	875	802	761	748	843	783	945	1 061
Debit (travel)	1 169	1 399	1 532	1 729	1 735	1 916	1 980	1 984	2 290
Net (travel)	-879	-524	-730	-969	-987	-1 073	-1 197	-1 039	-1 229
Net account for all economic sectors	-12 284	-11 863	-8 552	-8 972	-9 351	—	—	—	—
with world									
Credit (travel)	1 227	2 195	2 265	2 344	2 458	2 771	2 845	3 297	3 836
Debit (travel)	3 359	4 517	5 001	5 573	5 724	5 883	5 770	6 381	7 124
Net (travel)	-2 132	-2 321	-2 737	-3 229	-3 265	-3 112	-2 926	-3 084	-3 288
Net account for all economic sectors	-2 008	6 779	4 627	2 331	4 308	—	—	—	—

In The Netherlands, tourism receipts from nonresidents are three to four times higher than those from residents. Since 1987 receipts from nonresidents have grown steadily, while those from residents have remained almost unchanged. But expenditure by Dutch tourists abroad has always exceeded total receipts in The Netherlands.

The share of lodging and catering services was 3.8% in gross value-added (at market prices) and 4.6% in the number of persons officially occupied in the economy during the 1980s. Both figures remained stable throughout the 1980s. A slight improvement was observed towards 1990 and it coincided with an above average increase in total turnover by lodging and catering services.

In 1991 the Ministry of Economic Affairs received the results from a complex simulation model (Toer Model) of the main trends until the mid-1990s in the tourism market. Tourism receipts will increase mainly due to expenditure by international visitors than by resident tourists. There will be a tendency to take more, but shorter, holidays. The proportion of senior citizens among holidaymakers will increase significantly. Cultural aspects will become an important selection criterion. Inbound tourists from Spain and Italy are expected to increase.

Tourism Supply

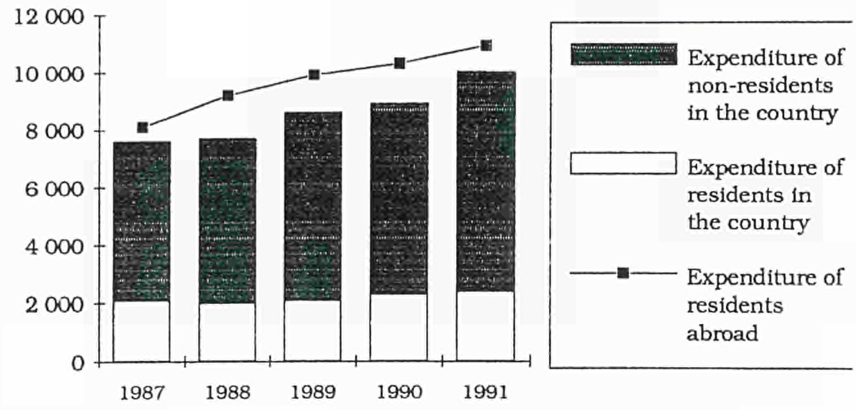
The definition of hotels and similar establishments was revised in 1988. Until 1987 data included hotels and similar establishments with more than 5 bedplaces, but after 1988 the cutoff level was raised to 20 bedplaces. As a result the number of establishments shows a sharp drop between 1987 and 1988.

The number of hotels has stabilized since 1988, whereas that of similar establishments has decreased moderately but steadily (119 in 1988, 98 in 1991). The proportion of similar establishments is very low compared with hotels; in 1991 they accounted for about 6% of the total for the two categories.

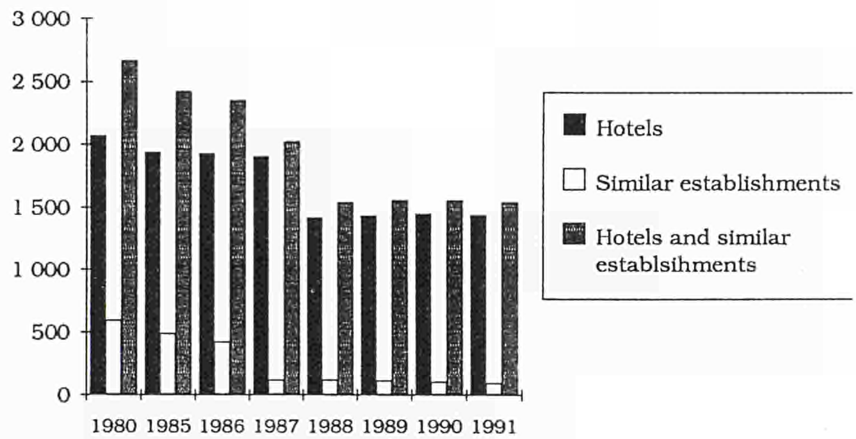
As in most other European countries, hotels in The Netherlands are raising their capacity. The number of bedplaces increased by almost 7% between 1988 and 1991, while that of hotels remained stable.

Hotels have also moved upmarket. Since 1988 the number of bedplaces has decreased in 1-star hotels and stagnated in 2-star hotels, but it has increased in the higher categories (3-star and above). The average annual growth rate was highest (10.46% during 1988–1991) for 4-star hotels; that of 3-star hotels was 7.23%. These two categories offer the bulk of bedplaces (61%).

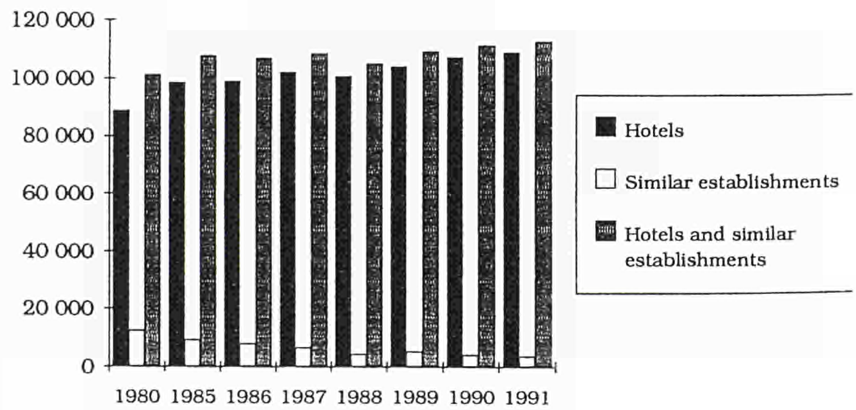
Global tourist expenditure (in Mio. national currency)



Number of hotels and similar establishments



Bed-places in hotels and similar establishments



Transport infrastructure

Railways

	1980	1985	1986	1987	1988	1989	1990	1991	1992
Length of lines (km)	2 880	2 824	2 817	2 809	2 828	2 828	2 798	2 780	2 758
Passengers carried (Mio.)	197	206	210	222	230	239	256	290	333
Passenger-km (Mio.)	8 892	9 007	8 919	9 396	9 664	10 235	11 060	15 195	15 350

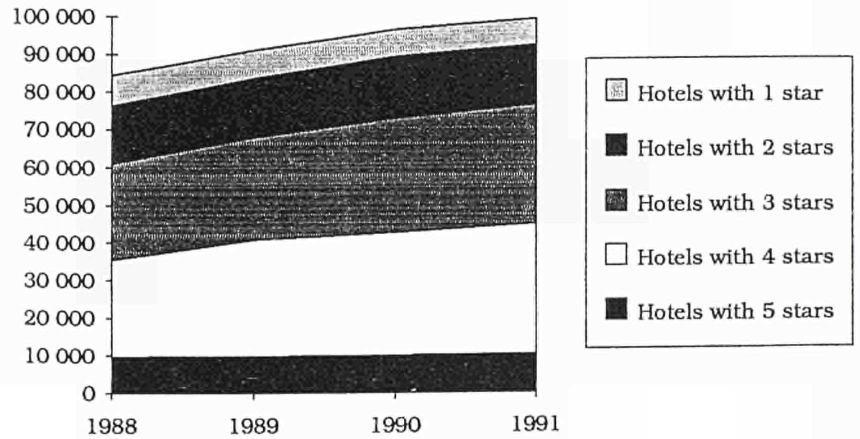
Road

	1980	1985	1986	1987	1988	1989	1990	1991	1992
Motorways (km)	1 798	1 915	1 978	1 984	2 048	2 045	2 060	2 092	2 134
Stock of buses and coaches	11 200	11 550	11 530	11 480	11 700	11 892	12 113	12 427	12 341
Cars (1000)	4 550	4 852	4 921	5 020	5 173	5 371	5 509	5 650	5 785
Cars per 1000 inhabitants	318	335	338	343	351	379	369	376	382

Aviation

	1980	1985	1986	1987	1988	1989	1990	1991	1992
Aircraft movements - all (1000)	162	195	209	222	234	235	252	—	—
Total passengers (1000)	10 123	12 271	12 610	14 154	15 142	16 150	16 822	—	—

Bed-places in Hotels according to quality



Unlike many other European countries, The Netherlands has a significant—although decreasing—proportion of unclassified hotels (9% in 1991).

The number of bedplaces at campsites and tourist villages is impressively high by European standards. The total for 1991 was about 500 000 bedplaces—four times the total for hotels and similar establishments. The figures reflect the preference of the Dutch for camping holidays.

Nonaccommodation tourist activities (eg, restaurants and bar-restaurants, travel agencies, car rentals) developed steadily after the late 1980s.

Air, road, and rail transport grew until the early 1990s.

The number of plane movements kept pace with the growth in passenger traffic. The more intense use of bigger aircraft since 1986 is indicated by the higher number of passengers compared with plane movements. As in any small country, air traffic is concentrated at one major airport. In 1992 about 92% of the passengers went through Amsterdam's Schiphol airport.

Road transport indicators for the number of vehicles (eg, number of buses and coaches, number of cars per 1 000 inhabitants) showed a steady upward trend. Expansion of the motorway network was, however, moderate in the late 1980s, but it accelerated again in the early 1990s.

The length of the railway network has decreased slightly since 1980. The number of passengers and passenger kilometres has grown steadily, however, particularly after 1990. Passenger kilometres rose by 37% in 1991 and the number of passengers by approximately 14% in 1991 and 1992.

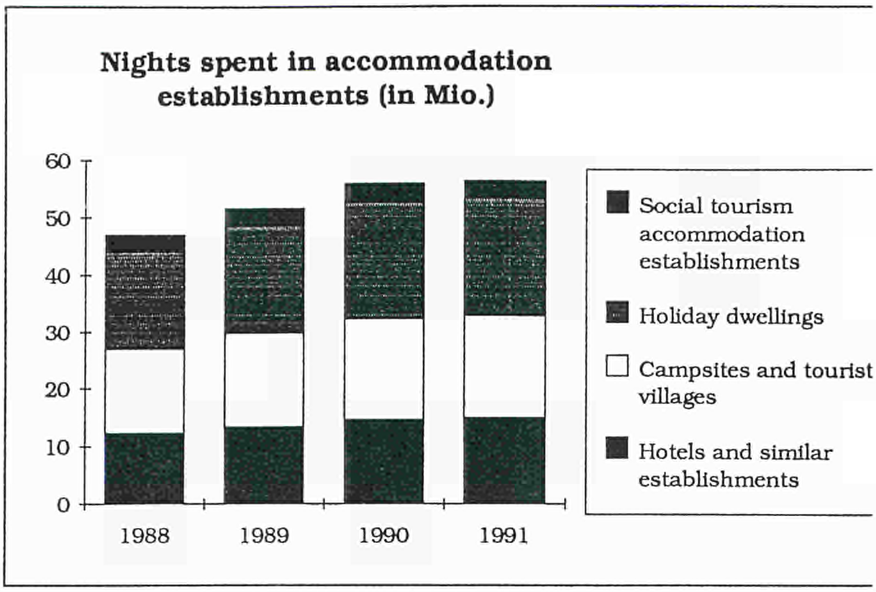
Tourism Demand

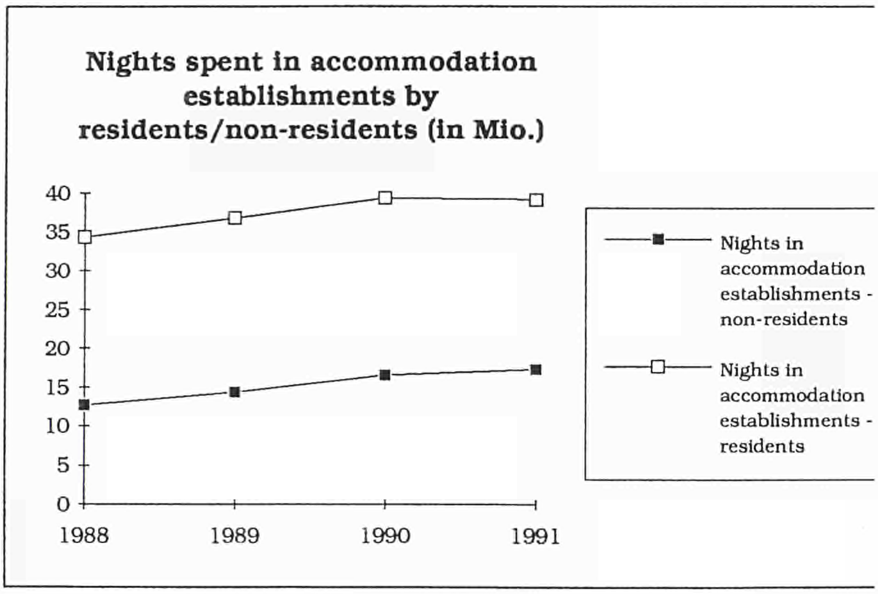
The methodological changes in the compilation of tourism statistics in 1987 also affect data on tourism demand.

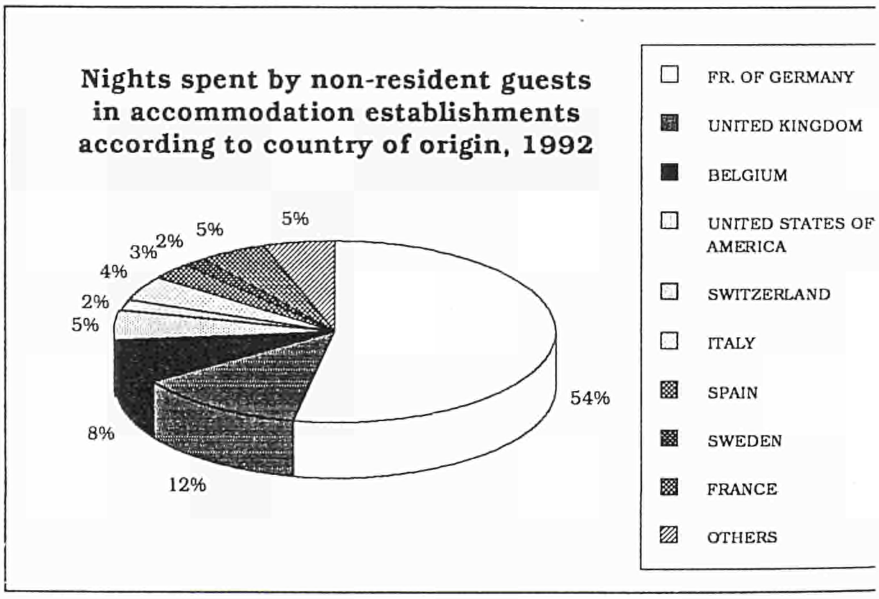
A special feature of Dutch tourism is the significant demand created both by residents and nonresidents in The Netherlands, and by Dutch travellers in other countries.

The number of nights spent by Dutch residents in accommodation establishments is more than double that of overnights by nonresidents. Between 1990 and 1991 growth for nonresidents was checked and it slowed down for residents.

Tourists from neighbouring Germany form the dominant group (more than 50%) among nonresident guests. Their impact on the Dutch tourism industry is even more pronounced when data on same-day visits are considered, as these are popular among Germans living close to the Dutch border. The other neighbouring countries—the United Kingdom (12% of overnights) and Belgium (8%)—rank







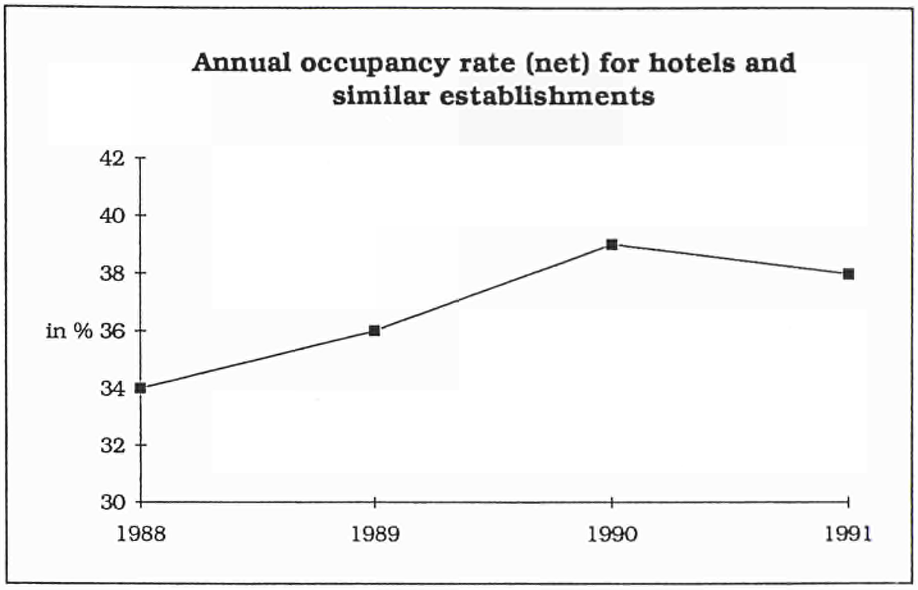
eurostat

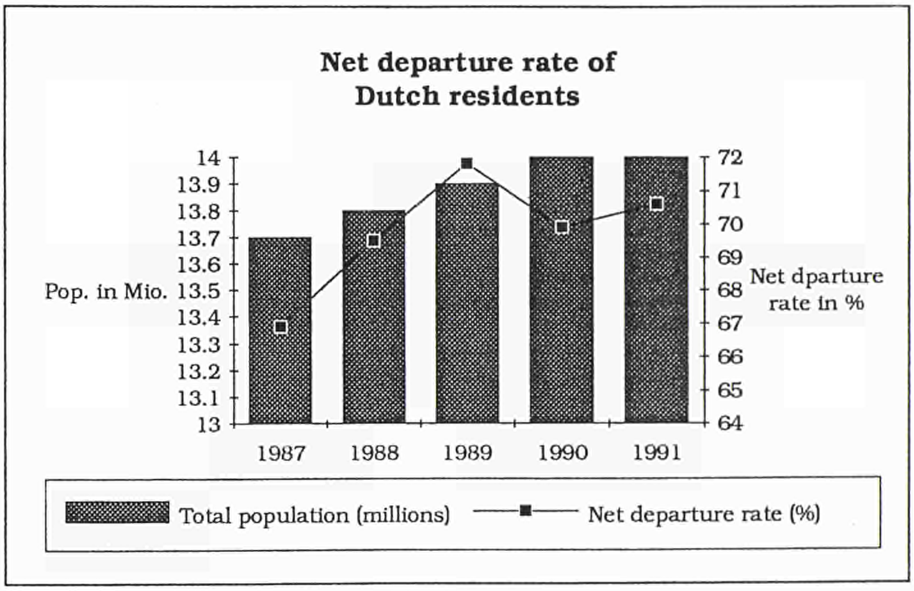
next. The United States has a comparatively high share (5%), considering the distance.

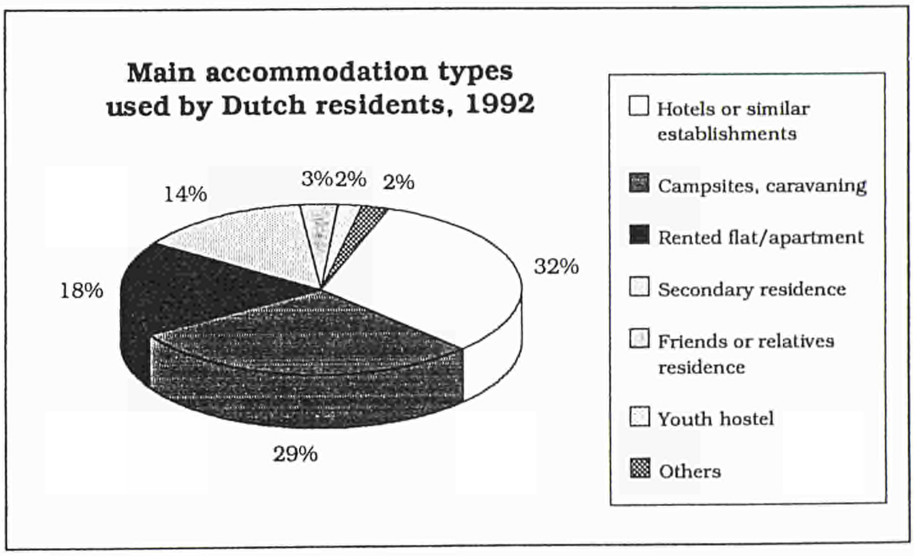
Occupancy rates for hotels and similar establishments follow the same trend as for other demand figures. The net occupancy rate rose from 34% to 38% between 1988 and 1990. The rate was slightly lower in 1991, which confirms the downturn in demand in the early 1990s.

Dutch residents have one of the highest departure rates (67%–72%) in Europe. In 1991 about 71% of the Dutch population (above 15 years) undertook at least one overnight trip. The departure rate rose until 1989 and fell slightly in the early 1990s. This trend was confirmed by turnover figures of travel agents and tour operators. Before 1989 turnover grew by approximately 12% annually; they then dropped to an average of less than 5%.

Most Dutch residents prefer destinations outside the country. Trips abroad accounted for 58% of the total in 1988, compared with 56% in 1991. The two main destinations, based on the total number of overnights, are Germany (16%) and France (15%). Two other important destinations are the United Kingdom (13%) and Belgium (11%). The Dutch also visit traditional holiday destinations in the Mediterranean region and the Alpine countries Switzerland and Austria. Despite its geographically small size, Luxembourg is also popular among visitors from The Nether-



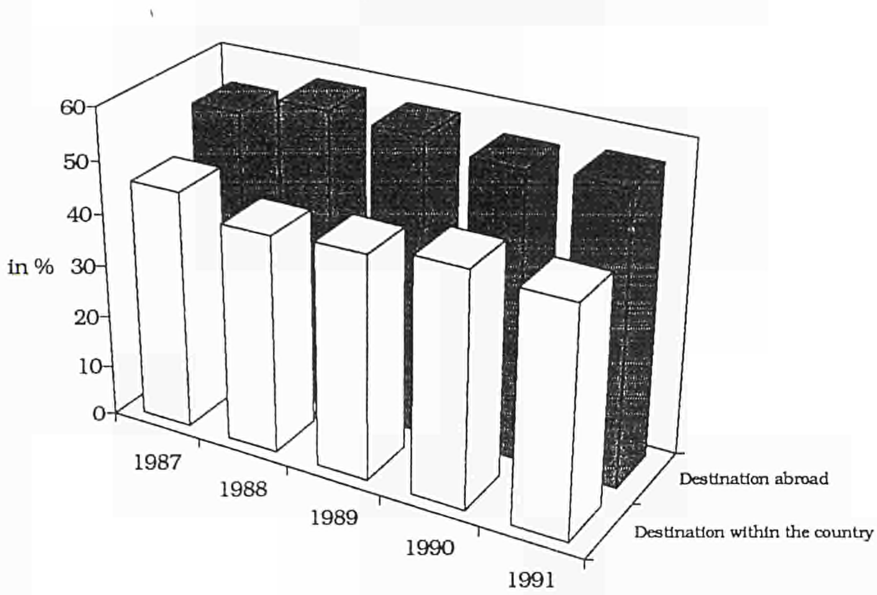




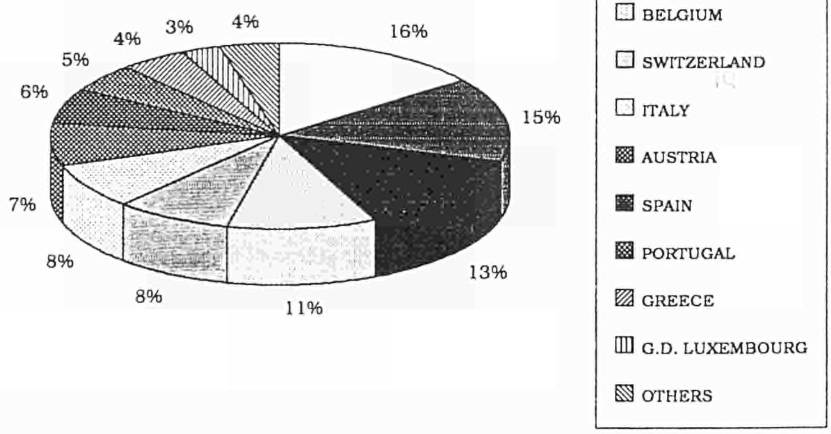
lands because of its proximity and excellent camping and caravaning facilities (eg, the Sure valley).

Dutch tourists prefer hotels or similar establishments (32%) and campsites (29%). Camping and caravaning are a typical feature of Dutch tourism. Rented flats and apartments rank third (18%), followed by secondary residences (14%). The remaining categories (eg, residence of friends or relatives, youth hostels) are of minor importance.

Destination of pleasure trips taken by Dutch residents



Nights spent by Dutch visitors in accommodation establishments abroad, 1991 - Total



General situation and key indicators: Development and impact of tourism

Portugal, like other Mediterranean countries, is a popular European holiday destination. Apart from having a significant sociocultural impact, tourism is one of the motors of economic development in Portugal. According to estimates by the Portuguese General Directorate for Tourism, the tourism industry accounts for about 8% of the gross domestic product (GDP); it has a greater impact than, for example, the construction and banking sectors. The share of tourism in GDP is expected to grow further in the coming years.

Inbound international tourism, mainly from other European countries, is more significant than outbound tourism by Portuguese residents travelling abroad.

Travel (tourism) in the Balance of Payments
(million ecus)

	1980	1985	1986	1987	1988	1989	1990	1991	1992	1993
with EUR 12										
Credit (travel)	453	814	928	1 138	1 253	1 421	1 740	1 870	—	—
Debit (travel)	118	176	209	229	281	315	423	523	—	—
Net (travel)	335	638	719	909	972	1 106	1 317	1 347	—	—
Net account for all economic sectors	927	1 831	1 524	852	305	359	134	-536	—	—
with Extra EUR 12										
Credit (travel)	373	658	625	723	799	1 028	1 027	1 156	—	—
Debit (travel)	91	131	123	137	171	217	257	209	—	—
Net (travel)	282	527	502	589	628	811	770	847	—	—
Net account for all economic sectors	-1 830	-1 371	-357	-461	-634	-216	-290	16	—	—
with world										
Credit (travel)	826	1 472	1 553	1 861	2 053	2 450	2 777	3 026	2 841	3 568
Debit (travel)	209	307	332	367	452	532	677	832	891	1 574
Net (travel)	617	1 165	1 221	1 494	1 601	1 918	2 100	2 194	1 980	1 994
Net account for all economic sectors	-903	460	1 167	391	-845	143	-156	-520	—	—

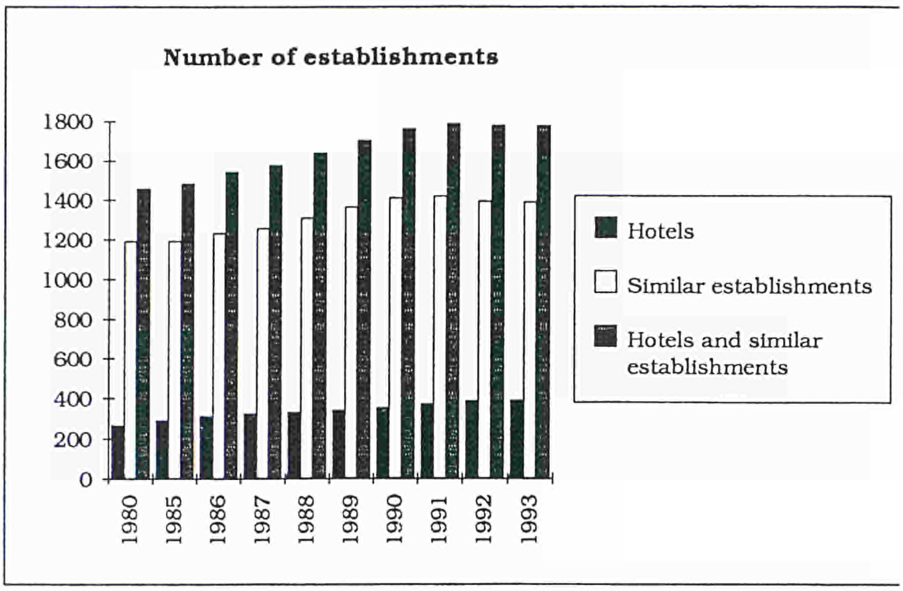
This situation is reflected in the balance of payments figures. Portugal's net account with all countries for all sectors is negative (ECU -520 million in 1991), while the net account for travel is clearly positive (ECU 1994 million in 1993) and has risen steadily since 1980. Growth was highest during 1986-1989; it has maintained a moderate rate until 1991. For the year 1992 and 1993 the net account showed slightly smaller figures.

The European Union (EU) accounts for the largest share (62% in 1991) of the positive travel balance, indicating the importance of Portugal as a destination for European travellers. But growth rates were low in the early 1990s. The net account with all other countries also stagnated.

The share of lodging and catering services in gross value-added (at market prices) of all market services was 7-7.5% during 1984-1988. It rose to almost 9% in 1990. Absolute value-added for the lodging and catering services increased by 124% between 1984 and 1990, compared with 89% for all market services.

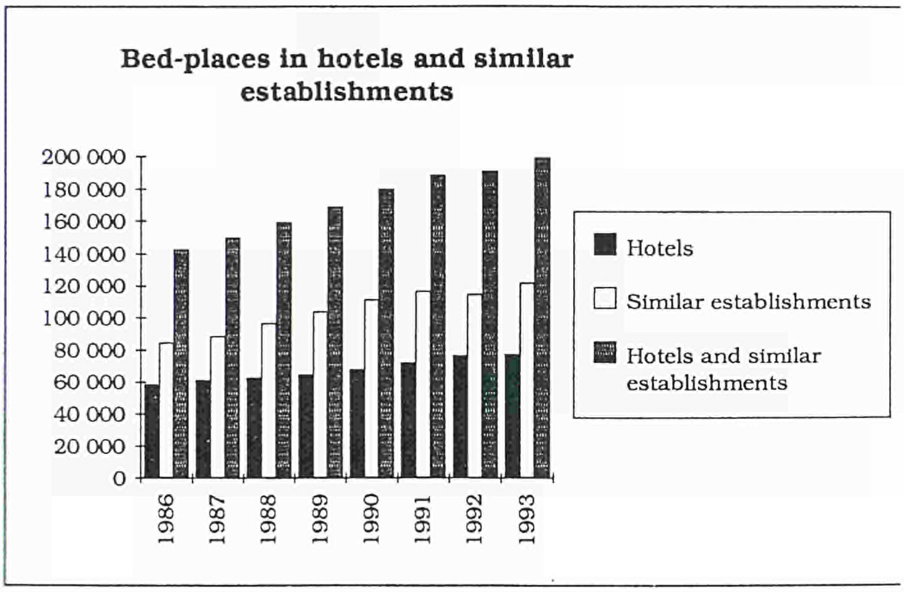
Tourism is a motor for the Portuguese labour market. In 1990 lodging and catering services alone accounted for 13.6% of the employees in market services. The relative share of lodging and catering grew until 1986 and then levelled off at 13.5% for the rest of the decade.

Given the importance of inbound tourism, arrivals at the frontier are indicative of changes in the sector. The upward trend in the number of arrivals continued until 1987 (16.2 million); the number then levelled off during the next 2 years. Arrivals picked up again in 1990 and totalled 20.2 million in 1992. About 94% of the arriving visitors in 1992 came from the EU countries.



Tourism Supply

During 1980-1991 the number of hotels and similar establishments grew from 1 456 to 1 785. It stagnated in 1992 and 1993. The ratio of hotels to similar establishments in Portugal remained unchanged at 1:4 throughout the decade, unlike the marked shift towards hotels in Spain. The high percentage of similar establishments can be partly explained by the Portuguese classification system, in which this category comprises a wide range of accommodation types.



A trend towards expansion was observed as the increase in bed-places (+54%) was much higher than that in the number of accommodation enterprises (+22%).

Accommodation enterprises are also moving upmarket. One-star hotels, which offer only minimum comfort, have almost vanished from the market; their share was reduced to 1.6% (1 197 bed-places) in 1992. Three- and four-star hotels have the highest number of bedplaces - 50 493, accounting for 70% of the market in 1992 - and the strongest growth rates. The number of luxury hotels remained almost the same during the decade. In 1992 they held 16 358 bedplaces and a market share of about 20%.

The number of enterprises in nonaccommodation tourist activities grew steadily during the 1980s. The highest rates were recorded in 1990-1991: restaurants and restaurant-bars, 16%; coffee bars and public houses, 23% travel agencies, 5%.

A comparison of passenge movement by air, road, and ra reveals the growing importanc of air and road traffic.

The number of rail passenge stagnated at around 224 millio between 1980 and 1992. Th number of passenger kilometre dropped from 6 036 million i 1988 to 5 695 million in 199 Several, nonprofitable sectors c the rail network were closed down and total length fell by about 480 km in one year from 3 607 km in 1988 to 3 126 km in 1989 (1992: 3 054km).

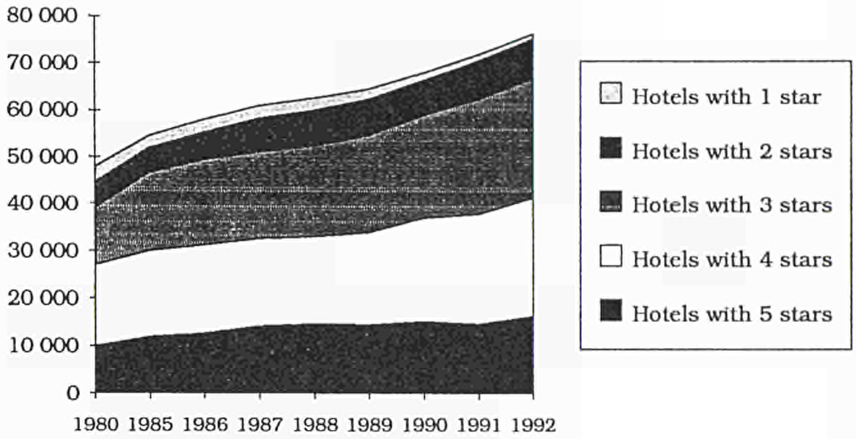
Road transport gained ground with the almost four-fold expansion of motorways from 132 km in 1980 to 519 km in 1992. The number of registered cars increased by 140%. In 1992 there was 1 registered car per 3 residents, compared with 7.3 residents in 1980.

The upward trend in the number of air passengers continued throughout the 1980s and peaked between 1985 and 1989. Plane movements also increased steadi-ly until the end of the decade. Despite a peak in 1990 (186 000 movements), they fell back in 1991 (170 000 movements) to their previous low level (169 000 movements in 1989) because of the Gulf war.

Tourism Demand

Portugal became a major destination for vacationers from central and northern Europe only in the 1970s. Until then tourism demand was confined to Lisbon-a popular destination for American tourists in the 1960s-and Madeira to a lesser extent. Political instability led to a slowdown during the mid-1970s. Since then international demand has developed steadily. Today, Faro (Algarve), Lisbon, and Funchal (Madeira) are among the best known European holiday destinations.

Bedplaces in hotels according to quality



Transport infrastructure

Railways

	1980	1985	1986	1987	1988	1989	1990	1991	1992
Length of lines (km)	3 588	3 607	3 607	3 607	3 607	3 126	3 127	3 117	3 054
Passengers carried (Mio.)	224	222	224	228	231	229	226	224	225
Passenger-km (Mio.)	6 077	5 725	5 803	5 907	6 036	5 908	5 664	5 692	5 695

Road

	1980	1985	1986	1987	1988	1989	1990	1991	1992
Motorways (km)	132	196	196	215	223	258	318	409	519
Stock of buses and coaches	8 489	10 439	10 631	10 827	11 031	11 572	12 099	12 348	12 827
Cars (1000) (*)	1 269	1 702	1 813	1 947	2 152	2 342	2 552	2 775	3 049
Cars per 1000 inhabitants (**)	136	181	193	207	229	250	272	297	326

Aviation

	1980	1985	1986	1987	1988	1989	1990	1991 (***)	1992
Aircraft movements - all (1000)	110	111	123	134	155	169	186	170	—
Total passengers (1000) (**)	5 450	6 985	7 690	8 467	9 211	9 871	10 811	10 505	—

(*) registered vehicles in continental Portugal, only

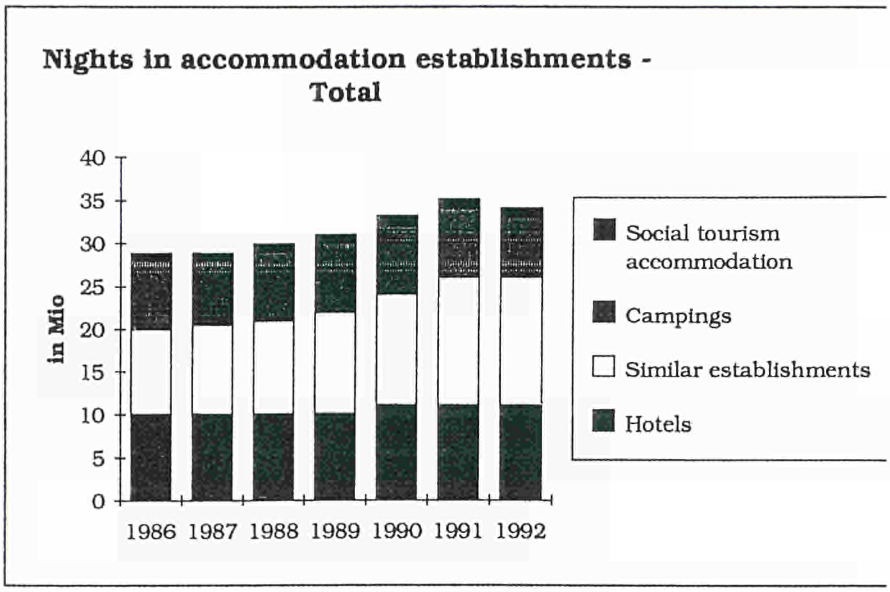
(**) transit passengers not included

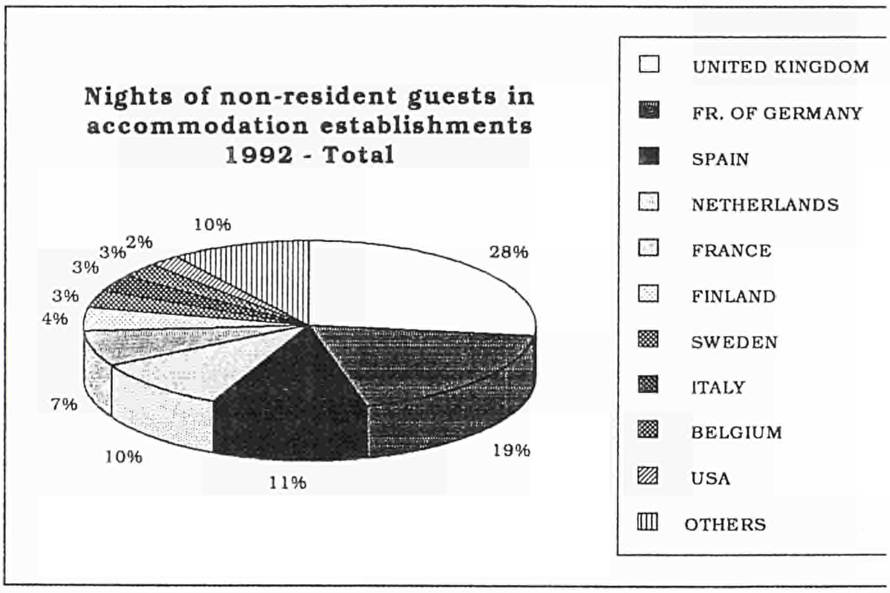
(***) activities out of Funchal and Porto Santo not included

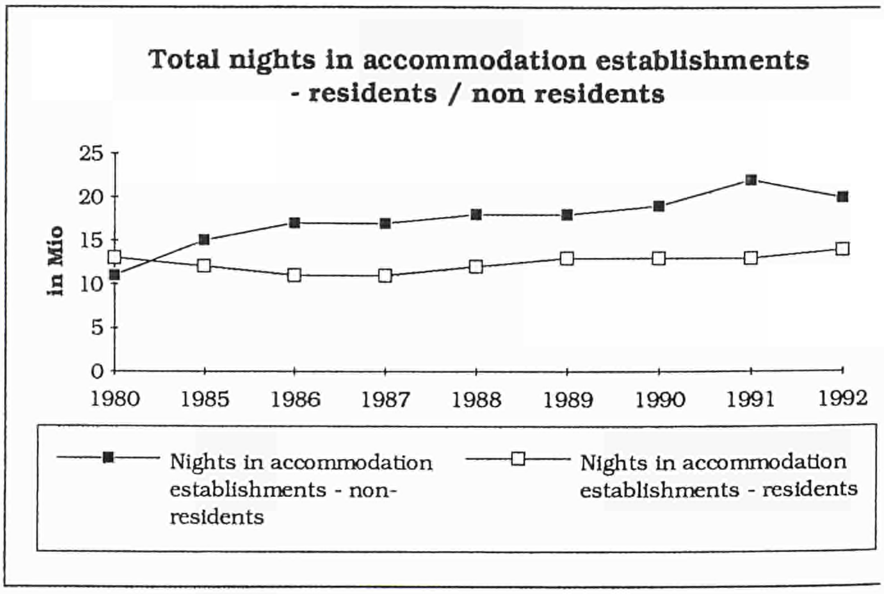
The total number of nights spent in officially registered accommodation establishments increased from 24.8 million in 1980 to 36.9 million in 1992. But it was not a steady rise because the rates dipped between 1986 and 1989 due to a slowdown in mass tourism throughout Europe in the late 1980s and rebounded in 1990-1991. The figures do not include data on nonregistered establishments, for which there is high demand in Portugal. The total number of nights would almost double to an estimated 67 million if nonregistered establishments were also considered.

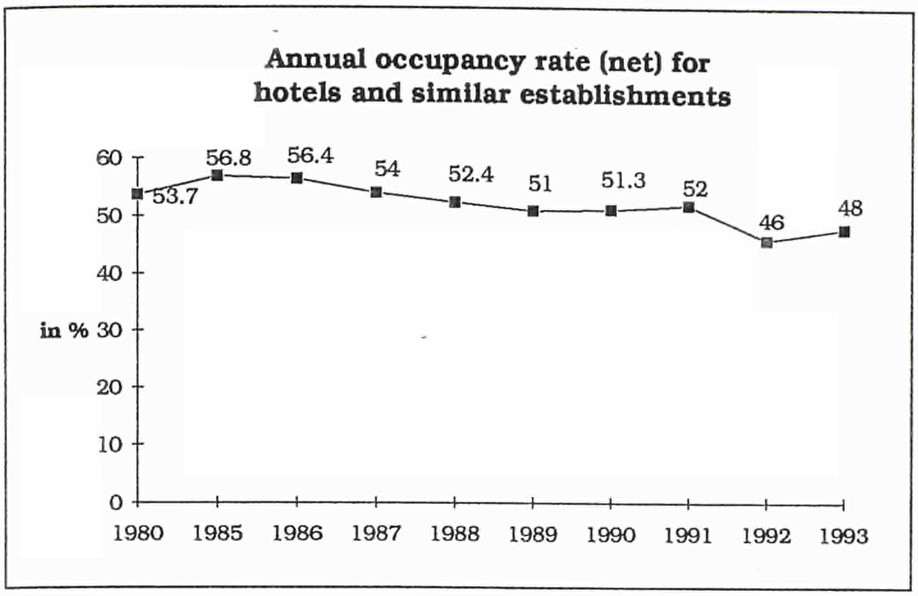
The share of nights at campsites is unusually high in Portugal. In 1992 it represented about 23% of the total for all accommodation establishments. This demand is almost exclusively generated by Portuguese residents. But as the number of nights at campsites remained almost level, any growth in the total for all tourist accommodations should be attributed to the rising demand for hotels and similar establishments.

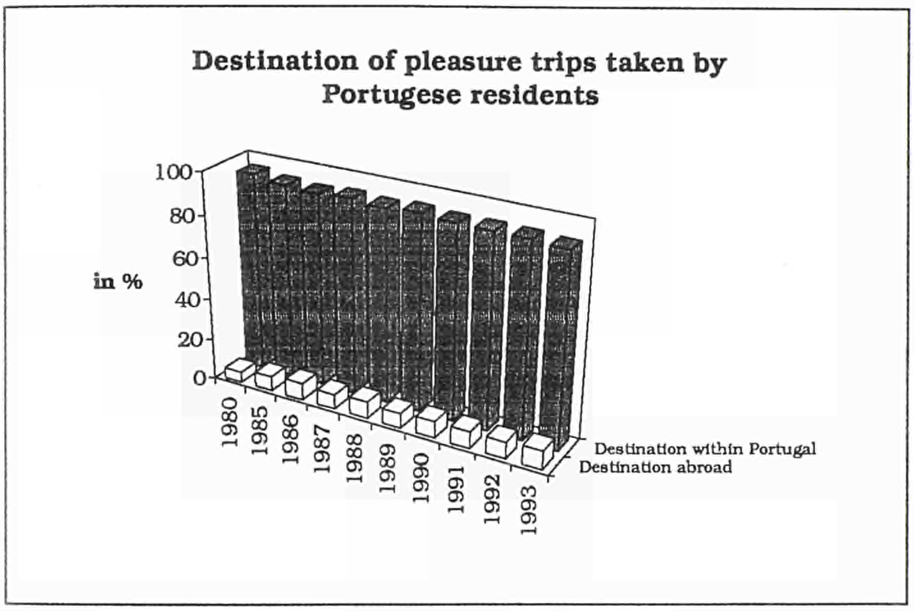
In 1980 residents outnumbered nonresidents for nights spent at tourist accommodations. Nonresidents subsequently narrowed the gap; in 1982 they exceeded 50% and by 1991 their share reached 62%. falling back to 59.5% in 1992.

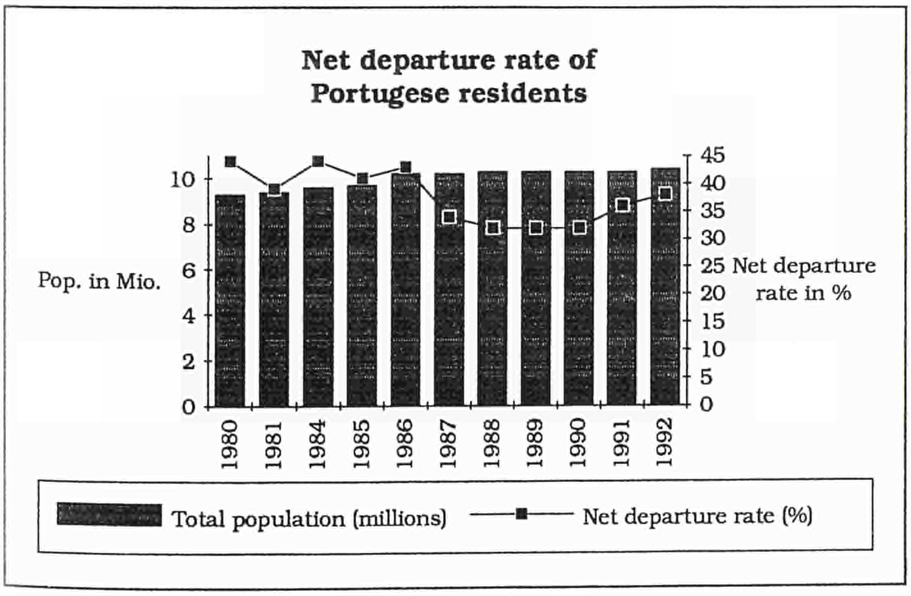












A breakdown by country of residence of inbound tourists shows that, in 1992, the United Kingdom ranked first with 28%, followed by Germany with 19%. However, current trends indicate that the share of British visitors has declined slightly, while that of German visitors has grown.

Other important countries of residence of tourists are Spain (11% in 1992), The Netherlands (10%), and France (7%). Unlike other tourists, Spaniards opt for short visits rather than package holidays. Demand by visitors from certain Scandinavian countries is significant. Finland (4%) and Sweden (3%) accounted for 7% of the nights spent by non-residents. The most important non-European country of residence is the United States, which accounted for 2% of the nonresident demand in 1992.

Throughout the 1980s the annual net occupancy rate for hotels and similar establishments showed little variation. The downturn in the late 1980s and early 1990s reflects the general slowdown in mass tourism to the Mediterranean countries and the increase in accommodation supply.

The peak tourist seasons for Portugal are summer and, to a lesser extent, Easter. However, seasonal differences are not very striking because Algarve and Madeira regularly receive off-season tourists mainly from the United Kingdom, Scandinavian countries, United States, and Canada.

Portuguese tourists mostly spend their holidays within the country. Since 1985 the percentage of outbound Portuguese tourists fluctuated between 7% and 8%. The dominance of inbound and domestic tourism explains Portugal's positive balance of payments for travel.

The net departure rate (part of the population over 15 years old leaving home for a trip at least once a year) dropped from around 40% in the mid-1980's to 32% in 1990; it recovered slightly in 1991 (36%) and 1992 (38%). Portuguese residents travel mainly by car, coach, and plane. They usually stay wit friends or relatives, in rente flats, or at campsites. Portugal luxury hotels are used mainly t foreign tourists. The economi impact of domestic tourism therefore secondary compare with inbound tourism.

General Situation and Key Indicators: Development and Impact of Tourism

Tourism plays an important role in the British economy. According to provisional figures for 1993, its share of the gross domestic product (GDP) was 3.8%. The share has remained relatively stable—between 3.1% and 3.9%—since the late 1970s.

The United Kingdom is a major tourism-generating country in the world. It ranks fourth, after the United States, Germany, and Japan, on the basis of expenditure on travel abroad. The United Kingdom ranks sixth for international tourism receipts, after the United States, France, Spain, Italy, and Austria.

The countries within the United Kingdom (England, Wales, Scotland, and Northern Ireland) have specific tourism profiles. The mountain areas, seaside resorts, typical countryside, and historical and cultural towns offer a variety of experiences distinct from London, a world metropolis. In addition, the Channel Islands and other smaller islands are popular visit destinations.

Travel (tourism) in the Balance of Payments
(million ecus)

	1980	1985	1989	1990	1991	1992
with EUR 12						
Credit (travel)	1 624	2 348	3 374	3 553	3 854	3 799
Debit (travel)	2 673	5 104	7 919	7 674	8 134	8 551
Net (travel)	-1 049	-2 756	-4 545	-4 121	-4 280	-4 752
Net account for all economic sectors	161	-4 856	-28 943	-19 519	-4 492	—
with Extra EUR 12						
Credit (travel)	3 323	6 892	6 941	7 353	6 371	6 622
Debit (travel)	1 902	3 166	5 978	6 217	5 894	6 485
Net (travel)	1 421	3 726	963	1 136	477	137
Net account for all economic sectors	4 598	9 599	-3 398	-4 322	-4 537	—
with world						
Credit (travel)	4 947	9 240	10 315	10 906	10 225	10 421
Debit (travel)	4 575	8 270	13 897	13 891	14 028	15 036
Net (travel)	372	970	-3 582	-2 985	-3 803	-4 615
Net account for all economic sectors	4 759	4 742	-32 341	-23 841	-9 029	—

The United Kingdom's travel (tourism) balance credit increased rapidly in the early 1980s, decreased in 1986 and then recovered slowly towards the late 1980s before stabilising in the early 1990s. The travel debit was smaller than the credit in the early 1980s but it increased more rapidly in the late 1980s. The net travel balance turned negative in 1986 and has slowly grown more negative over the years. As the current deficit for all sectors is considerably smaller than it was at the turn of the decade, the travel share accounts for a large part of the negative net balance for all sectors.

The net travel balance of the United Kingdom with other countries of the European Union (EU) is traditionally negative; the net balance with non-EU countries (extra EU) is traditionally positive, although it has decreased since the mid-1980s.

The highest negative travel balances are with Spain, France, Greece, Portugal, and Italy, while the highest positive travel balances are with the United States, Japan, Australia, Germany, and Canada.

Tourism represents a substantial part in the export of services and its share clearly increased during the 1980s, from about 25% to 30%. The share of tourism in GDP or all exports remained approximately at the same level. The result is quite good, considering the rapid increase in the oil export in the 1980s.

The figures showing the value of tourism in the British economy exclude domestic same-day visitor expenditure, which was estimated to be about ECU 12 800 million according to a survey carried out in 1991/92 by the Department of National Heritage.

The share of tourism spending in total consumer spending was over 6% in the late 1970s. After that it has varied between 5.0 and 6.0 per cent. The 1992 figure was 5.4%. These estimated percentages also exclude domestic same-day visitor spending.

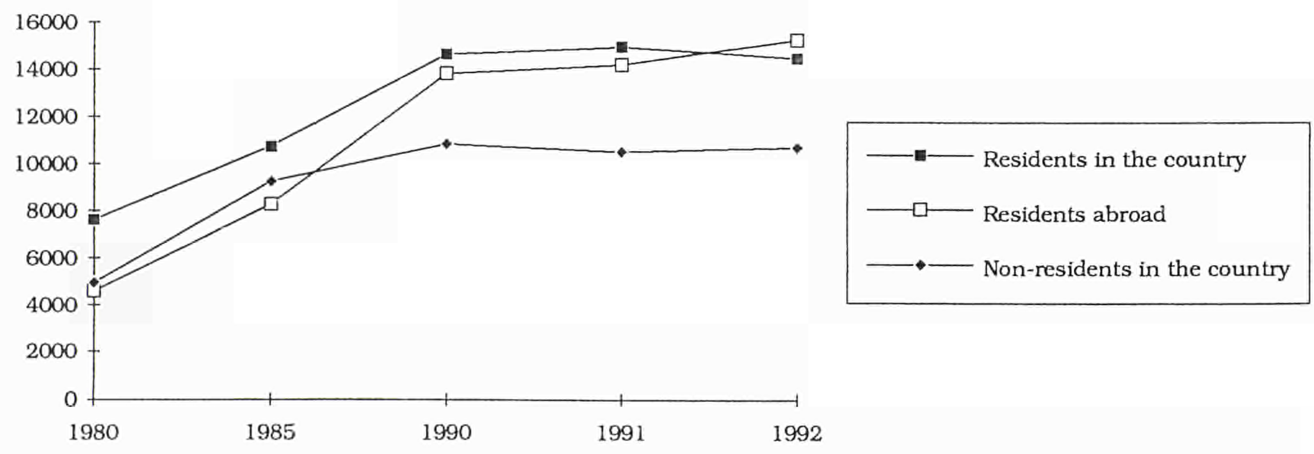
Domestic tourism has long been the most important form of tourism in the United Kingdom. 1992 was the first year when British residents spent more money for outbound tourism than for domestic tourism. Outbound tourism has been the fastest growing form of tourism in the United Kingdom since the late 1980s, although growth in the early 1990s has been quite slow.

Tourist expenditure breakdown includes inbound and domestic tourist expenditure. Spending patterns of resident and nonresident visitors are similar for accommodation and eating out. The patterns differ for shoppir and travel within United Kin; dom because the travel structure are different. Inbound touris spend more on shoppir (27.1%), compared with dome: tic tourists (13.0%), while dc mestic tourists spend more c travel within the United Kingdoi (18%) than inbound touris (8.6%). Entertainment include visits to tourist attractions, hi: toric sites, theatres, concerts, an similar types of recreation.

Tourism in the British economy (million ecus)

	1980	1985	1990	1991	1992
GDP total	387 469	606 621	746 141	818 260	807 23
of which tourism	13 873	22 312	27 360	28 040	28 00
Tourism share, % of GDP	3.6	3.7	3.7	3.4	3.
Domestic tourism	7 602	10 739	14 162	14 936	14 45
International tourism to the UK	6 271	11 574	13 198	13 104	13 54
UK exports, total	147 654	268 273	293 620	313 234	286 45
Tourism share, %	4.2	4.3	4.5	4.2	4.
UK exports, services	25 843	41 115	43 421	45 224	44 39
Tourism share, %	24.3	28.1	30.4	28.9	30.

Total tourism expenditure (at current prices, million ecus)



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Expenditure during same-day trips naturally excludes accommodation, but for other items the spending pattern of same-day and overnight visitors is quite similar. Eating out (25%) and alcoholic drinks (13%) form the largest items, followed by shopping of clothes (13%), and gifts and souvenirs (9%). The third largest item is travel (fuel, 12%; fares, 5%; parking charges, 1%). Admission charges (12%) rank fourth. Other items make up the remaining 10%. The 1991/92 Day Visits Survey covered trips that lasted three or more hours and included both leisure and nonroutine business trips.

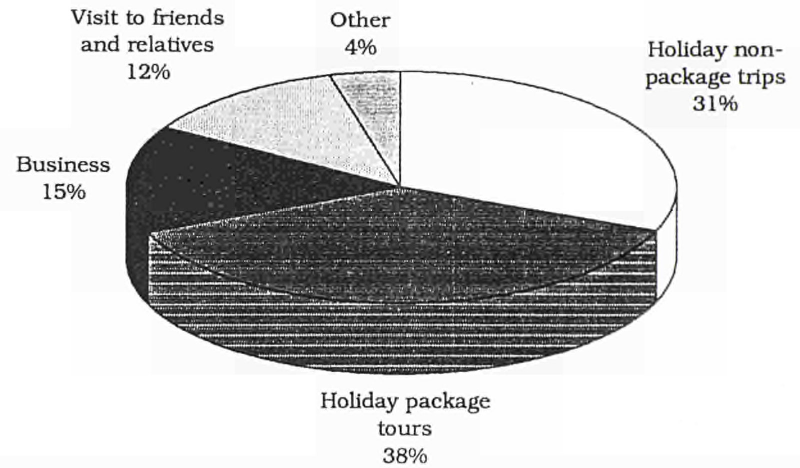
Tourism Supply

The number of hotels and similar establishments (mainly guest houses and boarding houses) in the United Kingdom is about 40 000 and it has remained at the same level since the mid-1980s. The number of bedplaces in these establishments has grown steadily, from 935 000 in 1986 to about 1 million.

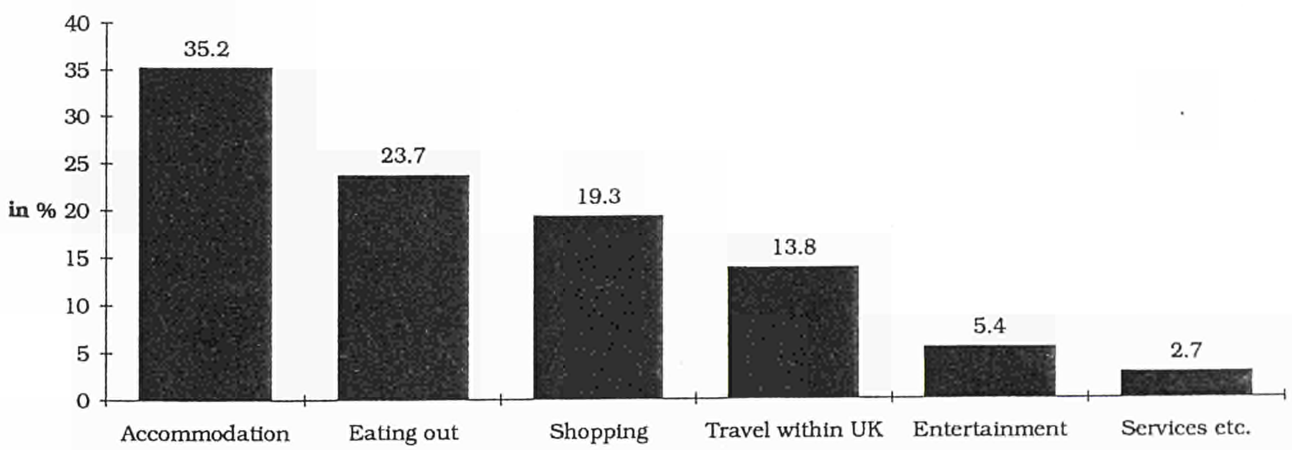
In Wales the number of hotels was 1 700 (50 000 bedplaces) and that of similar establishments was 2 700 (21 000 bedplaces) in 1992. In Scotland there were 2 900 hotels (98 000 bedplaces) and 8 200 similar establishments (44 000 bedplaces) in 1992. In Northern Ireland the number of hotels was 130 (7 000 bedplaces) and that of similar establishments, 850 (10 000 bedplaces). In England, the number of hotels and similar establishments was 22 000 (721 000 bedplaces).

The number of supplementary accommodation establishments in the United Kingdom is about 37 000 (2.0 million bedplaces). Campsites form the majority of their capacity; in 1992 they numbered about 4 000 (over 1.5 million bedplaces). Holiday centres numbered 31 700 (about 400 000

UK residents' outbound visits by purpose of visit, 1992



Tourism expenditure breakdown in the UK, 1992



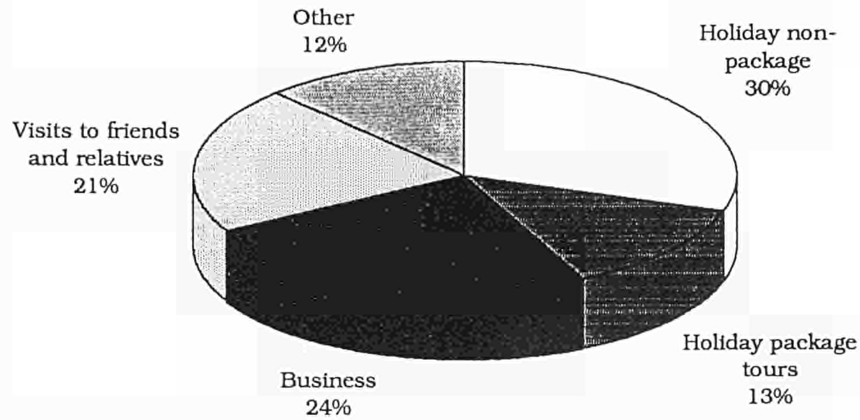
bedplaces) and social tourism accommodation establishments (mainly youth hostels) over 900 (over 130 000 bedplaces).

In addition, 650 universities, colleges, and similar bodies provide 95 000 bedplaces for tourists during vacations, when they are not used for students. At least 22 000 private homes provide about 170 000 bedplaces.

There are more than 100 000 restaurants and public houses in the United Kingdom. The number of travel agencies is slightly below 7 000 and there are almost 900 tourist information offices run by public tourist boards or local authorities.

The number of persons employed in accommodation enterprises and other tourism-related industries in 1992 amounted to about 1.7 million, of whom 180 000 were self-employed and about 1.5 million were employees. Hotel and other tourist accommodation enterprises employed 360 000 persons; restaurants, cafés, snack bars, public houses, bars, night clubs, and licensed clubs employed 880 000 persons; and museums, libraries, art galleries, and sports and other recreational services employed 440 000 persons. In the early 1990s the number of employed persons decreased slightly in both accommodation and catering businesses. The tourism-related industries account for over 6% of the total employed labour force.

Inbound visitors to the UK by purpose of visit, 1992



Transport infrastructure

Railways

	1980	1985	1988	1989	1990	1991	199
Length of lines (km)	17 645	16 752	16 599	16 587	16 584	16 558	16 5
Passengers carried (Mio.)	760	686	764	758	762	740	7
Passenger-km (Mio.)	30 300	30 400	34 300	33 600	33 200	32 100	31 7

Road

	1980	1985	1988	1989	1990	1991	199
Motorways (km)	2 694	2 813	2 993	2 995	3 070	3 100	3 2
Stock of buses and coaches	78 300	74 700	80 700	80 700	80 800	79 800	80 9
Cars (1000)	15 619	17 737	19 940	20 925	21 485	21 515	21 9
Cars per 1000 inhabitants	277	306	349	366	373	373	3

Aviation

	1980	1985	1988	1989	1990	1991	199
Aircraft movements - all (1000)	730	839	1 008	1 078	1 119	1 078	..
Total passengers (1000)	50 403	61 600	82 350	87 149	89 930	84 345	94 5

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Tourism also creates jobs in other sectors. For every two direct jobs created in the tourism industry, one indirect job is created elsewhere in the economy.

Air traffic was the fastest growing mode of transport until 1990. After the drop in 1991 it started to grow again in 1992. The 1993 figures were: 1.2 million plane movements and 100 million passengers.

Construction of motorways continues. The number of cars increased slowly in the early 1990s after the growth in the 1980s. The number of buses and coaches has fluctuated around 80 000 since 1988.

The length of railway lines operated in the United Kingdom has decreased by over 1 000 km since 1980. The number of passengers and passenger kilometres have also declined slightly during the past few years.

Tourism Demand

Overnight stays in the United Kingdom totalled 577 million in 1991. This figure is considerably lower than the 1980 figure of 696 million overnights. The decrease is due to fewer overnight stays by residents. In 1991 residents spent only 396 million overnights, compared with 550 million overnights in 1980. A great part of the decrease in domestic overnight stays is probably due to a shift from overnight trips to day trips. Overnight stays by nonresidents increased from 146 million in 1980 to 181 million in 1991.

The growth in the number of inbound visitors corresponds to that in the number of overnights by nonresidents. According to the International Passenger Survey, the number of inbound visitors increased from 12.4 million in 1980 to 18.5 million in 1992. Expenditure by inbound visitors increased from ECU 4.95 million in 1980 to ECU 10.69 million in 1992.

Compared with 1980, the number of visitors increased markedly for all countries, particularly Japan and southern European countries, where the starting level was rather low. Variations in the number of visitors are considerably larger for non-European tourists than for European tourists. This was clearly seen in 1991, when the Gulf crisis perceptibly reduced the number of visitors from all countries outside Europe, but it had little effect on Europeans travelling to the United Kingdom.

Arrivals by air increased from 7.0 million in 1980 to 11.5 million in 1991. In 1980 seaports recorded 5.1 million arrivals (41% of all arrivals) and although the number increased to

Visitor arrivals to the UK by country of residence ('000)

	1980	1985	1989	1990	1991	1992
Total	**12 421**	**14 449**	**17 338**	**18 013**	**17 125**	**18 535**
USA	1 695	3 166	2 842	2 991	2 320	2 748
France	1 603	1 620	2 261	2 297	2 289	2 483
Germany	1 519	1 484	2 027	1 895	2 134	2 268
Ireland	956	968	1 302	1 312	1 314	1 416
Netherlands	910	762	940	996	1 118	996
Italy	408	494	708	713	722	784
Belgium	676	476	590	543	662	771
Spain	296	342	622	604	623	684
Canada	387	631	639	694	547	629
Australia/N.Z.	467	556	658	747	577	620
Japan	162	211	505	563	458	554
Sweden	327	380	481	525	502	507
Switzerland	365	339	424	446	434	433
Denmark	220	201	259	272	273	315
Norway	167	237	287	278	283	297
Austria	106	108	148	154	158	180
Greece	103	118	128	132	118	128
Portugal	48	64	95	104	101	102
Finland	56	70	165	137	112	98
Iceland	20	22	30	49	32	52
Luxembourg	15	28	27	26	27	31
Other Europe	...	...	...	...	516	542
Rest of World	...	...	...	...	1 805	1 897

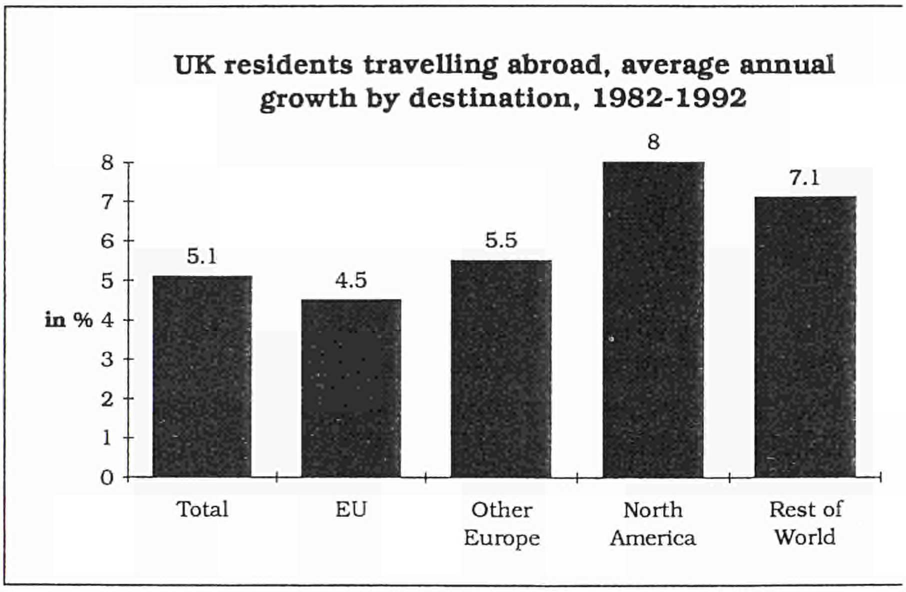
5.4 million in 1991, the share of maritime transport was reduced to 30% of all arrivals.

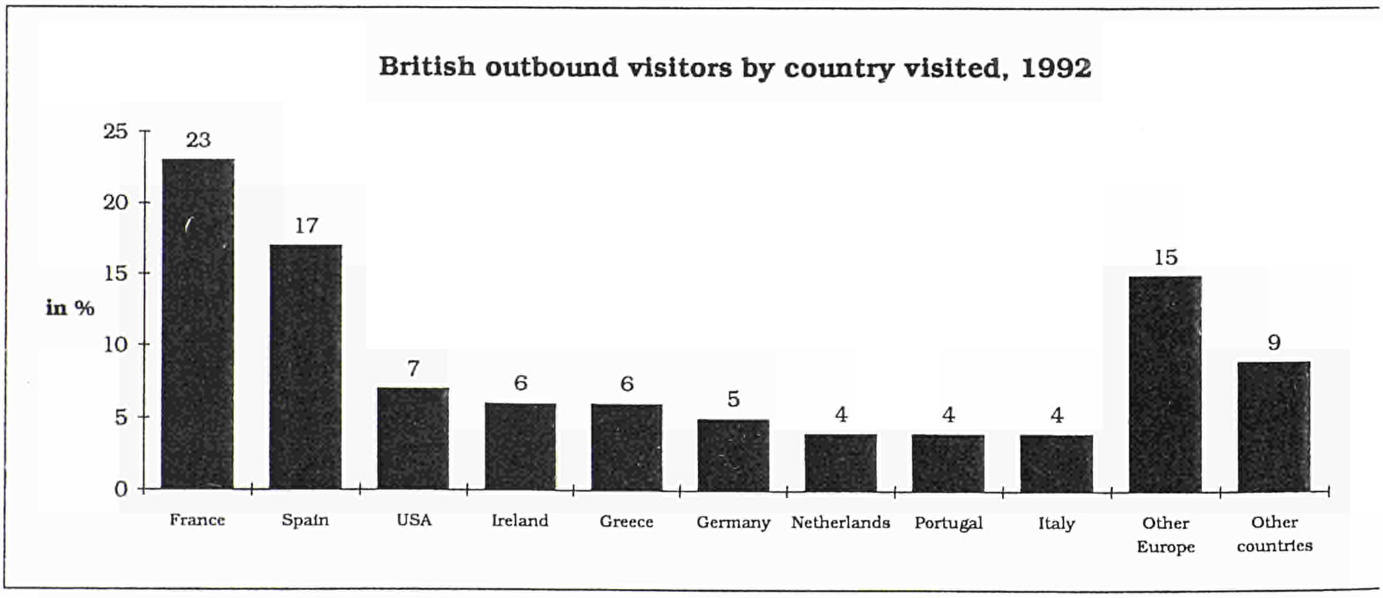
During 1982–1992 average annual growth in the number of inbound visitors was nearly 5%. The growth rate was below 4% during 1987–1992 but it improved rapidly to 8% during 1991–1992. Business trips grew most rapidly during the 10-year period (6.4% annually). Visits to friends or relatives (VFR) and holiday package tours had average growth rates, while other holiday trips (nonpackage) and miscellaneous trips had below-average growth rates. The fastest growth rate between 1991 and 1992 was recorded for package tours, mainly because they had the steepest drop in 1991 due to the Gulf crisis.

A comparison of the purposes of visits for inbound and outbound tourism shows that the share of business trips and VFR is lower in outbound tourism and that of holiday trips is very large. Outbound tourists opt for package travel more than inbound tourists.

The number of nights spent in domestic tourism in 1992 was 400 million according to the United Kingdom Tourism Survey. This total includes 306 million overnights in England, 42 million in Scotland, 40 million in Wales, and 5 million in Northern Ireland. The number of nights spent abroad totalled 254 million. Residents made 95.6 million domestic overnight trips and the 23.7 million out bound trips. The average dura tion was therefore 4.2 overnight per domestic trip and 10.7 over nights per outbound trip.

Average expenditure during out bound trips was ECU 77/nigh which was double that durin domestic trips (ECU 37/night Per night expenditure in Scotlan (ECU 39) was higher than th British average. Per night ex penditure in Wales (ECU 31 was lower because the share c





holidays was higher than that of business travel, compared with British averages.

In England, West Country (including Scilly Isles) is the most favoured holiday destination with a 21% share of holiday trips (17% of all trips and 8% of business trips), while London is the most important business travel destination (19% of business trips, 6% of holiday trips, 9% of all trips).

The British National Travel Survey 1993, an annual survey by the British Tourist Authority, gives information on long holiday trips (>4 nights) taken by British residents. In 1993, 61% of British adults took one or more long holidays. The percentage was exactly the same in 1981, but the tourism profile has changed. The share of persons taking long holiday trips within the United Kingdom dropped from 45% in 1981 to 37% in 1993, and the share of persons taking outbound trips increased from 21% to 33% (plus 2% to Ireland) during the same period.

The number of holidays has also increased. The proportion of people who had only one holiday dropped from 40% in 1981 to 36% in 1993. The percentage for two holidays remained roughly on the same level (15% in 1981, 16% in 1993). The share of those taking three or more holidays increased from 6% in 1981 to 9% in 1993.

The type of accommodation selected during holidays in the United Kingdom has not changed notably since the mid-1980s. In 1993, hotels and similar establishments were the most popular type of accommodation but their share was not higher than 26%. Accommodation provided by friends or relatives accounted for 21%, caravans 20%, and rented accommodation 13%.

For outbound trips, the share of hotels and similar establishments was high at 49% in 1993, even if it has decreased notably since 1982 (61%). The change has been in favour of rented villas and flats, whose share grew from 3% in the 1970s to 23% in 1987. The 1993 figure is on the same level, 24%. Accommodations provided by friends or relatives maintained the same level (18% in 1993).

British residents made nearly 34 million trips abroad in 1992, according to the International Passenger Survey. The increase from 1991 was 10% (3 million trips). The number of trips overestimates the effect of short trips to neighbouring countries. According to this variable France appears as the most popular destination, whereas Spain ranks first for the number of overnights by British residents travelling abroad.

There have been perceptible changes in travelling patterns to southern Europe. Travel to northern and central Europe has been more stable. Spain is the most favoured country, although the figures have declined considerably since the peak of 34 million overnights in 1986. Italy, the second most favoured country in 1980, has suffered the most noticeable decline; it is the only country for which the 1980 figure is markedly higher than

Nights spent by tourists from the UK in EU/EFTA countries in hotels and similar establishments ('000)

	1980	1985	1990	1991	1992
Spain	18 110	25 024	19 567	19 045	19 451
France	....	....	10 962	10 171	11 084
Greece	5 814	7 544	6 090	5 324	6 605
Portugal	2 681	4 952	5 260	5 618	5 697
Italy	6 264	4 910	5 129	4 546	4 572
Austria	1 981	3 744	4 389	3 664	3 563
Ireland	....	....	2 642	3 562	3 316
Germany	2 037	2 278	3 015	2 712	2 746
Switzerland	1 354	1 935	2 024	1 848	1 849
Netherlands	1 073	1 318	1 519	1 519	1 625
Belgium	860	1 051	1 199	1 109	1 328
Norway	310	450	341	347	429
Denmark	316	333	333	316	320
Sweden	237	259	271	228	239
Finland	83	108	142	132	127
Luxembourg	43	46	64	63	73

later figures. Some countries, like Portugal and Ireland, have maintained and sometimes gained popularity.

Outbound trip growth percentages show an overall slowdown for European destinations. Europe's share in outbound holidays fell from 84% in 1983 to 74% in 1993. North America and other farther destinations gained popularity during 1982–1992, while average annual growth of outbound tourism to Euro declined. Travel has becon more global and countries ou side Europe are increasing popular holiday destinatio among British residents.

General Situation and Key Indicators: Development and Impact of Tourism

Austria's scenic beauty, geographic position, and rich culture have made it a natural tourist attraction. Foreign tourists are of significant importance since only 43% of Austrian residents choose to spend their holidays in their country.

The Austrian government has launched a massive marketing campaign to promote the sector. Its main sales arguments are relaxation and comfort (*Gemütlichkeit*).

The total number of arrivals at the frontiers increased by 50% during the 1980s. The opening of eastern Europe has contributed largely to this inflow. The country's advantageous location encourages most tourists (almost 95%) to arrive by car. The tourism pattern is therefore less organized.

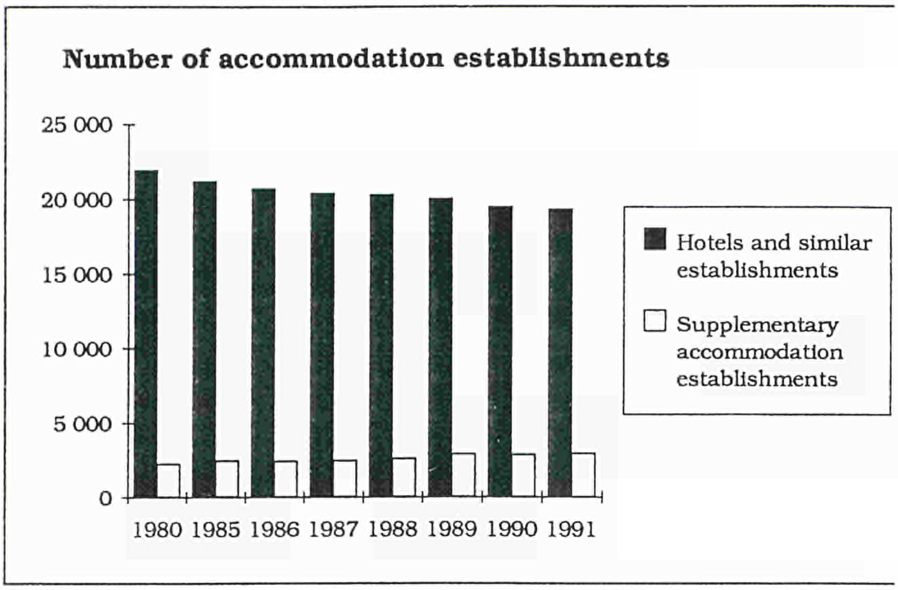
Travel (tourism) in the Balance of Payments
(million ecus)

	1980	1985	1986	1987	1988	1989	1990	1991
with EUR 12								
Credit (travel)	3 840	5 189	5 669	6 157	6 524	7 185	7 842	—
Debit (travel)	1 518	2 617	2 990	3 445	2 988	3 105	3 133	—
Net (travel)	2 322	2 572	2 679	2 712	3 536	4 080	4 709	—
Net account for all economic sectors	-1 702	-3 376	-2 851	-2 306	-2 246	-3 028	-1 995	—
with Extra EUR 12								
Credit (travel)	698	1 367	1 122	1 390	1 681	2 214	2 400	—
Debit (travel)	761	1 077	1 015	1 394	2 104	2 483	2 911	—
Net (travel)	-63	290	107	-4	-423	-269	-511	—
Net account for all economic sectors	225	3 217	3 102	2 118	1 978	3 177	2 908	—
with world								
Credit (travel)	4 546	6 557	6 792	7 434	8 207	9 400	10 425	11 419
Debit (travel)	2 281	3 695	4 006	4 865	5 093	5 589	6 226	6 498
Net (travel)	2 265	2 862	2 786	2 569	3 114	3 811	4 199	4 921
Net account for all economic sectors	-1 476	-159	250	-187	-268	149	913	-115

Austria had a positive net balance of ECU 4 920 million for travel in its balance of payments in 1991, which represents an increase of 175% over 1980. This positive value is even more significant as the overall net balance is negative (ECU -115 million in 1991). The positive travel balance is entirely derived from exchange with countries of the European Union (EU). The travel balance with the rest of the world (excluding EU, extra EUR 12) is negative due to the higher rate of outbound tourism. International tourism receipts from non-EU countries (extra EUR 12) are not sufficiently high to compensate for expenditure by Austrian tourists in these countries; the net balance for travel with these countries therefore declined during the 1980s. But the overall net travel balance (world) has improved steadily during the decade because strong development of tourism from the 12 EU countries has more than offset the relatively small negative balance with other countries (extra EUR 12).

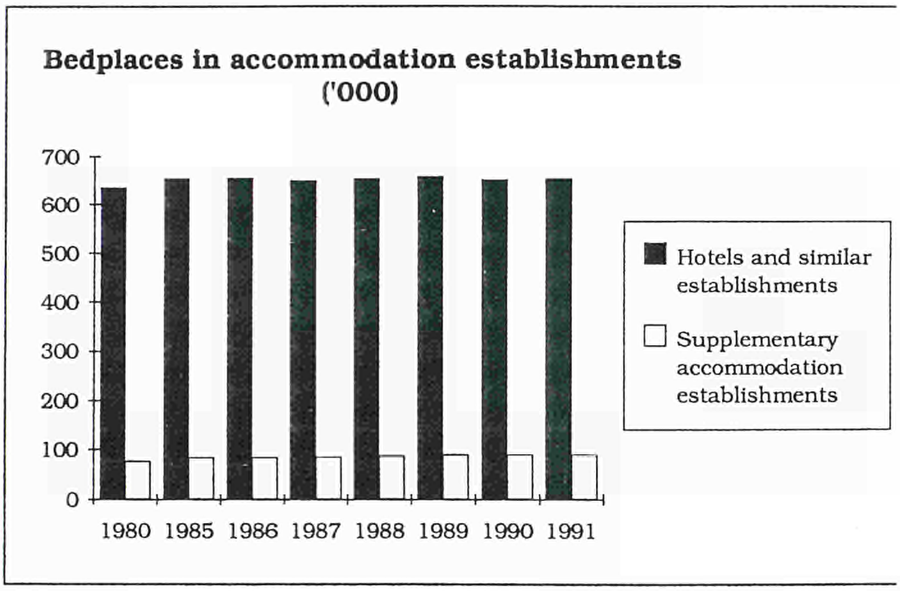
The share of lodging and catering services in gross value-added (at market prices) generated by market services as a whole fluctuated around 8% during 1984-1991. Although absolute value-added of lodging and catering services increased by 113%, it was still lower than the overall growth rate of 129% recorded for all market services.

Tourism is a motor for the Austrian labour market. Persons occupied in the lodging and catering services accounted for a stable 11% of the total for market services during the 1980s. This invariability reflects a certain degree of inefficiency and reduced labor productivity. For example, in 1991 labour productivity in the lodging and catering services increased by 0.3% over the previous year, compared with 0.7% in market services as a whole.

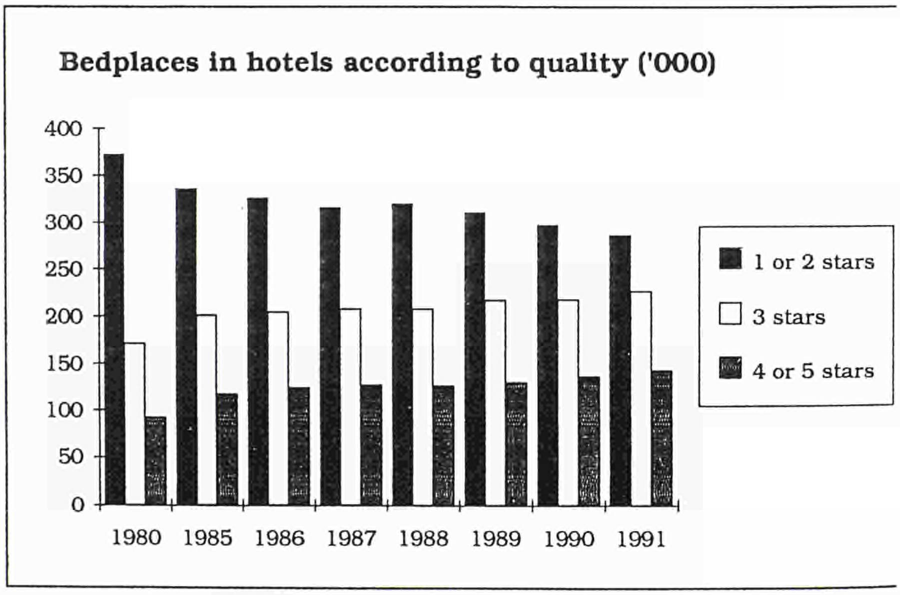


Tourism Supply

In the 1980s the number of hotels and similar establishments decreased from 21 911 in 1980 to 19 257 in 1991 due to closures of several lower-grade accommodations (16 556 in 1991). Accommodation supply followed a demand shift towards higher quality. The number of three- to five-star hotels increased, while that of one- and two-star hotels fell by 25% during the 1980s. Changes in the number of rooms and bedplaces followed the same general trend.



The 54% increase in the number of bedplaces compared with the 28% increase in the number of three- to five-star hotels indicates an expansion of the enterprises operating these hotels. Despite the crisis in one- and two-star hotels, the number of bedplaces per hotel also increased due to a general expansion in establishment size.



A distinctive feature of the Austrian tourism sector is the growing importance of rented houses and flats. In 1991 they totalled 18 947, which represents a 119% increase over 1980. Private rooms (including those on farms), however, declined from 65 077 to 43 453.

Road and air transport developed substantially, while growth was moderate for rail transport.

Plane movements almost doubled and the total number of air passengers more than doubled (3.6 million in 1980; 7.8 million in 1991) during 1980-1991.

The number of cars increased by 40%, compared with 3% for buses and coaches.

The number of rail passengers dropped from 170 million in 1980 to 158 million in 1985 and rebounded to 173 million in 1991. Reorganization of routes and closure of unprofitable sectors of the railway network during 1980-1991 led to a 4% reduction in total line length. The number of passenger kilometres increased from 7 290 million in 1985 to 9 208 million in 1991.

Tourism Demand

The main constraints faced by Austrian tourism are tourist preference for southern European countries, competition from overseas destinations, and appreciation of the Austrian schilling. However, during the past 5 years, Austria gained a competitive edge owing to worsening pollution and mass tourism in the

Transport infrastructure

Railways*

	1980	1985	1986	1987	1988	1989	1990	1991	1992
Length of lines (km)	5 849	5 766	5 745	5 747	5 630	5 641	5 624	5 623	5 623
Passengers carried (Mio.)	170	158	158	159	160	163	168	173	177
Passenger-km (Mio.)	7 380	7 290	7 332	7 363	7 783	8 444	8 575	9 208	9 805

Road**

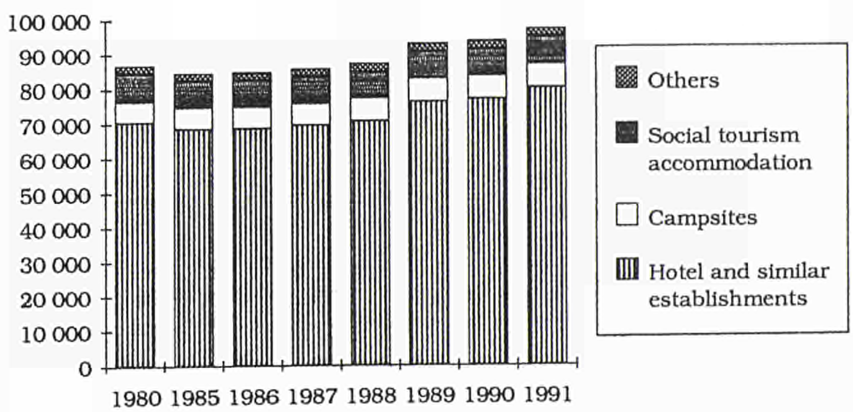
	1980	1985	1986	1987	1988	1989	1990	1991	1992
Motorways (km)	859	1 110	1 139	1 236	1 336	1 373	1 406	1 407	1 410
Stock of buses and coaches	8 980	9 183	9 209	9 267	9 274	9 405	9 402	9 269	—
Cars (1000)	2 246	2 530	2 609	2 648	2 784	2 902	2 991	3 100	3 203
Cars per 1000 inhabitants	298	335	345	352	366	391	388	397	408

Aviation

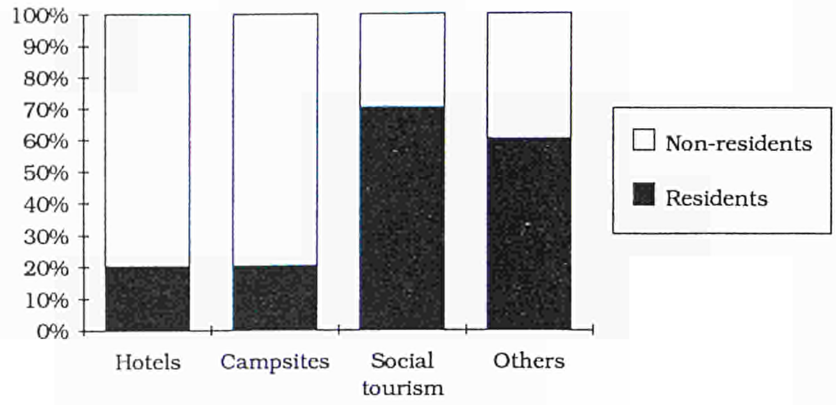
	1980	1985	1986	1987	1988	1989	1990	1991	1992
Aircraft movements - all (1000)	77	86	89	95	104	116	125	140	—
Total passengers (1000)***	3 658	4 873	4 798	5 492	6 289	7 004	7 729	7 827	—

*) situation at the end of the year
**) valid from January onwards
***) transit included

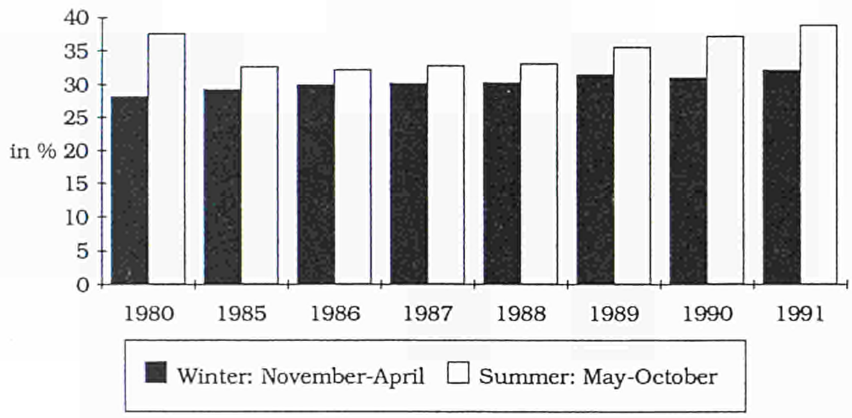
Nights in accommodation establishments ('000)



Resident and non-resident accommodation demand in 1991



Seasonal occupancy rate for hotels and similar establishments



Mediterranean countries, and conflicts in several countries of eastern Europe.

The number of nights spent in hotels and similar establishments increased from 70 million to 80 million (+14%) during the 1980s. The growth rate is slightly lower (12%) for tourism accommodations taken as a whole because of the downturn recorded for social tourism accommodations. Nights in private rooms (including those on farms) fell by 28% (21 million in 1991), while those in rented homes and flats increased by 230% (12 million in 1991).

As only 43% of Austrian residents spend their holidays in the country, residents account for only 25% of the total demand for overnights in tourism accommodations. Specifically, they accounted for 72% of nights spent in hotels and campsites, 22% in social tourism accommodations, and 6% in other accommodations. These proportions have remained stable during tl 1980s. They also highlight wi differences between resident ar nonresident tourist demand.

The absolute number of nigh spent in accommodation estal lishments has increased for bo resident and nonresident tourist:

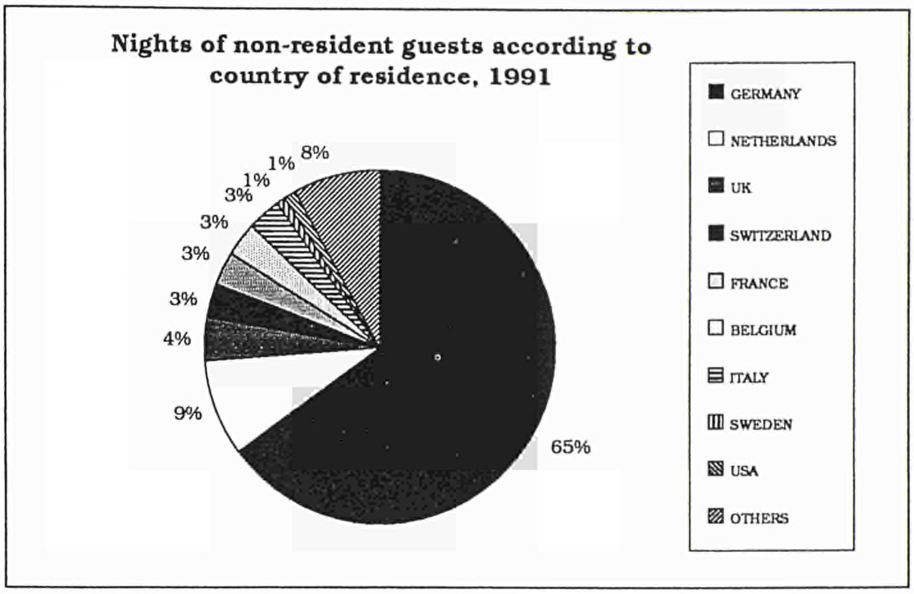
Germans (65%) held the highe share among nonresidents for a commodation demand in 199 They were followed by touris from The Netherlands (9%), ar the United Kingdom (4%).

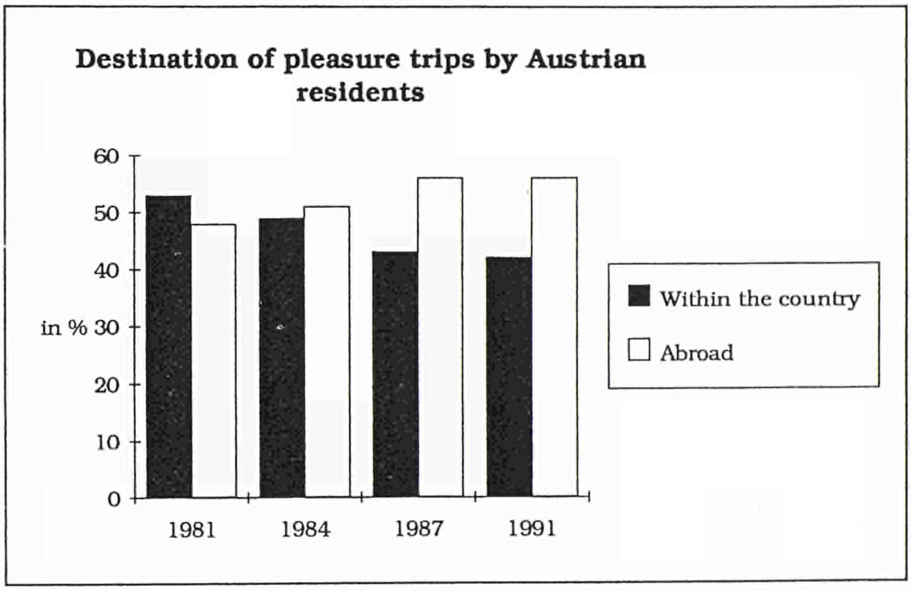
Data show a decrease in tl number of tourists from Tl Netherlands and the Unite States during the 1980s and a increase for tourists from tl United Kingdom and Italy. Tl number of Germans remains st ble.

Seasonal occupancy rate patter show only a slight difference b tween summer and winter se sons. In 1991, the occupanc rate was 32% in winter and 39 in summer. During the 1980s, tl winter occupancy rate rose co sistently, while the summer ra dipped moderately in the mi 1980s and reverted to its origin level by 1991.

The percentage of Austrian res dents who spend their holidays the country has been decreasir and fell to 42% in 1991. Ou bound tourist expenditure (t Austrian residents visiting oth countries) in 1991 was EC 6 490 million, compared wi ECU 1 142 million spent by i bound tourists in Austria. Bo figures increased by more than 200% during 1980–1991, although the relative proportion has remained almost unchanged.

The net departure rate increased from 40% in 1981 to 45% in 1990. The rise in international tourism led to an increase in the proportion of air passengers from 10% (1980) to 21% (1991), although car travel is still the main mode of transport for almost 59% of Austrian tourists. During their holidays, Austrians prefer hotels and similar establishments (43% of nights spent). Austrians normally organize their tours (66%) individually; only 28% use tour operators.





S12

General Situation and Key Indicators: Development and Impact of Tourism

Tourism demand and supply developed steadily during the 1980s in Finland.

International tourism receipts grew from ECU 713 million in 1987 to ECU 961 million in 1991, representing an increase of 35%.

The growth in outbound tourism since 1987 has, however, caused a deficit in the net balance for travel. Finnish residents spent more money abroad than foreign tourists spent in Finland. International outbound charter flights increased by 49% from 0.7 million in 1987 to 1.1 million in 1991.

The rapid 63% growth in international tourism expenditure from ECU 1 305 million in 1987 to ECU 2 126 million in 1991 can be partly explained by the gross national product (GNP) figures. Finland's GNP increased by 30% during this period, from ECU 75 697 million to ECU 98 439 million; per capita GNP grew by 56% from ECU 12 635 to ECU 19 690.

Total turnover (or gross output) of lodging, restaurant, and catering services increased (25%) from ECU 3 399 million in 1988 to ECU 4 252 million in 1990. Travel agents also increased (20%) their turnover from ECU 161 million to ECU 193 million during the same period.

The share of lodging and catering services in gross value-added grew by 65.5% between 1985 and 1990. But the tremendous activity in this sector is best reflected in the 203% growth in gross fixed capital formation during the 5-year period.

The number of persons engaged in lodging and catering services did not grow as steeply (13.5%, from 64 300 in 1984 to 73 000 in 1990). Provisional figures suggest a reduction of 11% between 1990 and 1991.

The number of air passengers grew by 83% during 1980-1992. Most of this growth took place during the last years of the decade (1987-1992) as the increase in air passengers during 1980-1987 was only 23%.

Transport infrastructure

Railways	1980	1985	1986	1987	1988	1989	1990	1991
Length of lines (km)	6 096	5 900	5 899	5 884	5 884	5 884	5 867	5 874
Passengers carried (Mio.)	39	40	35	46	46	46	46	46
Passenger-km (Mio.)	3 216	3 224	2 676	3 062	3 174	3 147	3 330	3 230

Road	1980	1985	1986	1987	1988	1989	1990	1991
Motorways (km)	194	204	204	204	214	215	225	249
Stock of buses and coaches	8 962	9 017	9 166	9 233	9 229	9 306	9 322	8 968
Cars (1000)	1 225	1 545	1 619	1 699	1 795	1 906	1 939	1 923
Cars per 1000 inhabitants	256	316	329	344	363	383	389	382

Aviation	1980	1985	1986	1987	1988	1989	1990	1991
Aircraft movements - all (1000)	231	265	272	302	341	362	401	377
Total passengers (1000)	5 630	7 311	7 160	8 680	9 829	10 923	11 504	10 283

Tourism Supply

The number of hotel rooms increased by 27% from 32 371 in 1987 to 41 091 in 1991, while the total for hotels combined with similar establishments increased by 23%, from 37 821 in 1987 to 46 533 in 1991. The number of bedplaces also increased (26%), reaching 97 434 in 1991 from 77 590 in 1987. The occupancy rate, however, fell from 53% to 43%.

The total number of campsites stayed the same, (347 in 1986, 348 in 1991), but the number of nights spent at campsites increased.

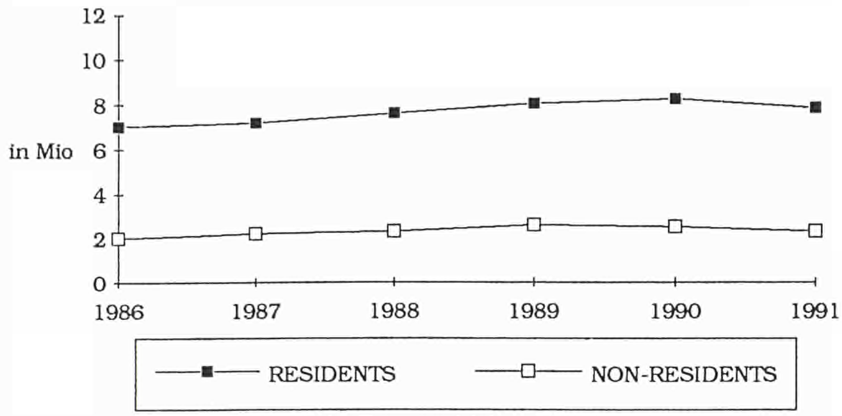
Restaurants and bar-restaurants increased their number by 17% during 1986-1990. The number of travel agencies and car rentals grew by 19% and 51%, respectively.

Air transport saw the highest growth. Rail transport, on the contrary, recorded the lowest growth rates.

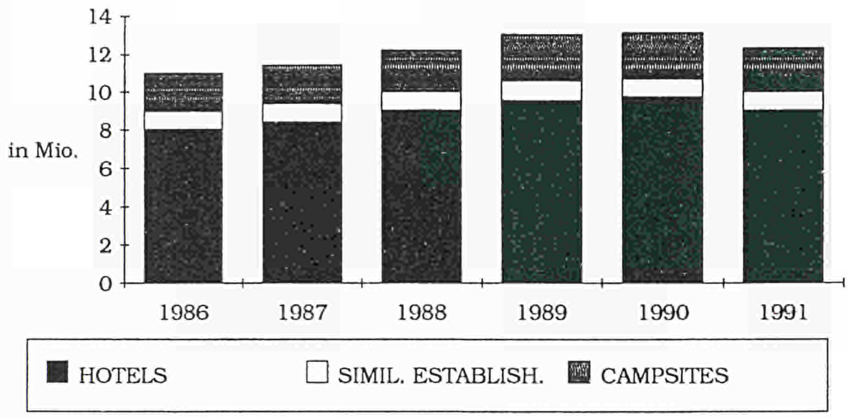
Plane movements increased by 63% from 231 000 in 1980 to 377 000 in 1991, while the total number of passengers increased by 83%.

The 57% growth in the number of cars from 1.2 million in 1980 to 1.9 million in 1991 can be largely attributed to the rise in car rentals. The number of buses and coaches remained stable (8 962 in 1980, 8 968 in 1991). Tourists preferred to travel to

Nights spent by residents and non-residents in accommodation establishments



Nights in accommodation establishments by type (Mio.)



Resident and non-resident accommodation demand in 1991

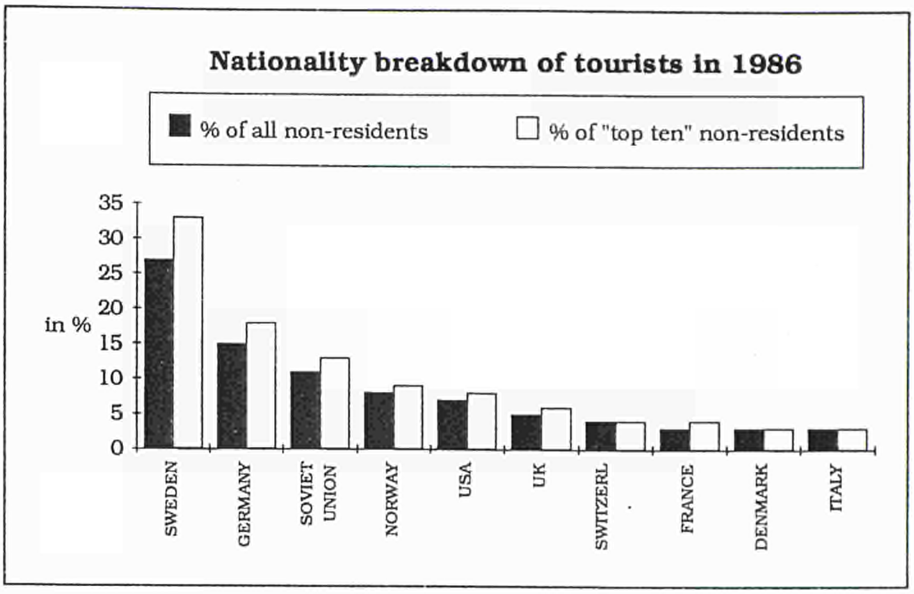
and through Finland by road rather than by rail.

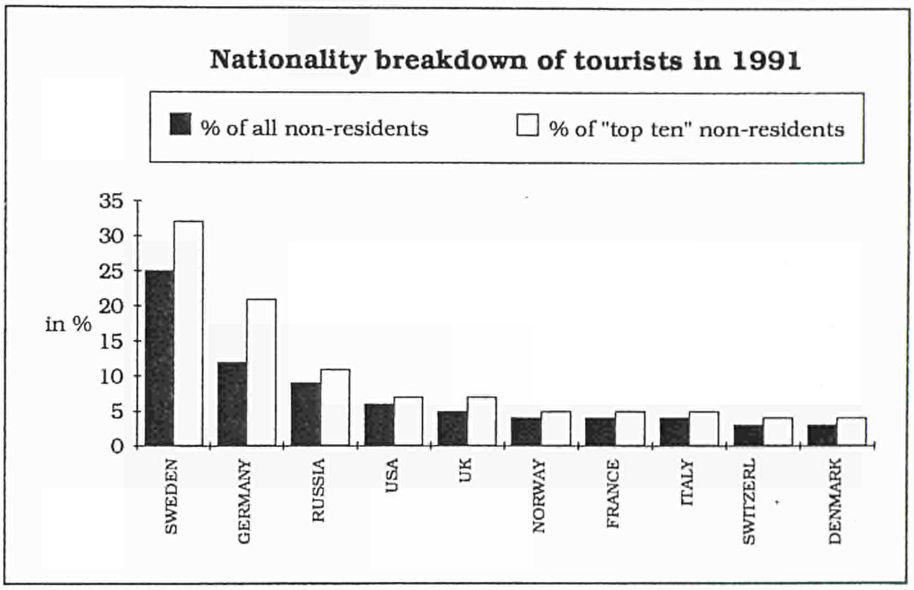
The increase in rail passengers was 18%, from 39 million in 1980 to 46 million in 1991. Length of lines decreased by 3.6%, while the number of passenger kilometres remained almost the same at around 3200 million.

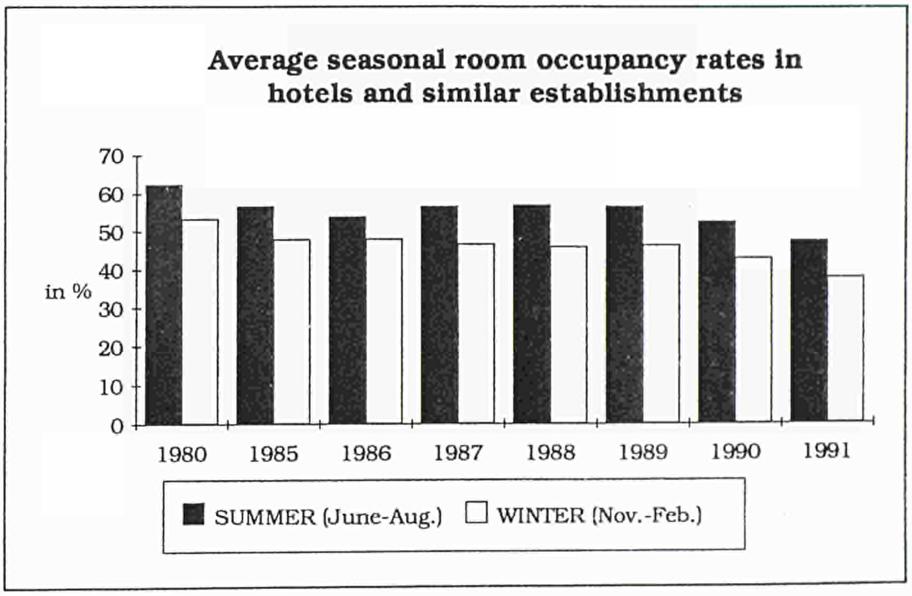
Tourism Demand

The total number of nights spent in accommodation establishments increased by 13% between 1986 and 1991. The growth rate was 12% for hotels and similar establishments and 16% for campsites. Residents increasingly prefer higher-quality accommodations. Between 1986 and 1991 the growth rate in the number of nights spent by residents was 16% for hotels and similar establishments, and 14.5% for campsites. The overall rate for residents was 13% for all accommodations, compared with 11% for nonresidents. Unlike residents, nonresidents preferred downmarket accommodations. The growth rate for nights by nonresidents in hotels and similar establishments was 8%, while that for campsites and tourist villages was almost 28%.

Swedes (25%) ranked highest among nonresidents for accommodation demand in 1991. They were followed by tourists from Germany (12.1%), Russia (8.9%), United States (5.7%), United



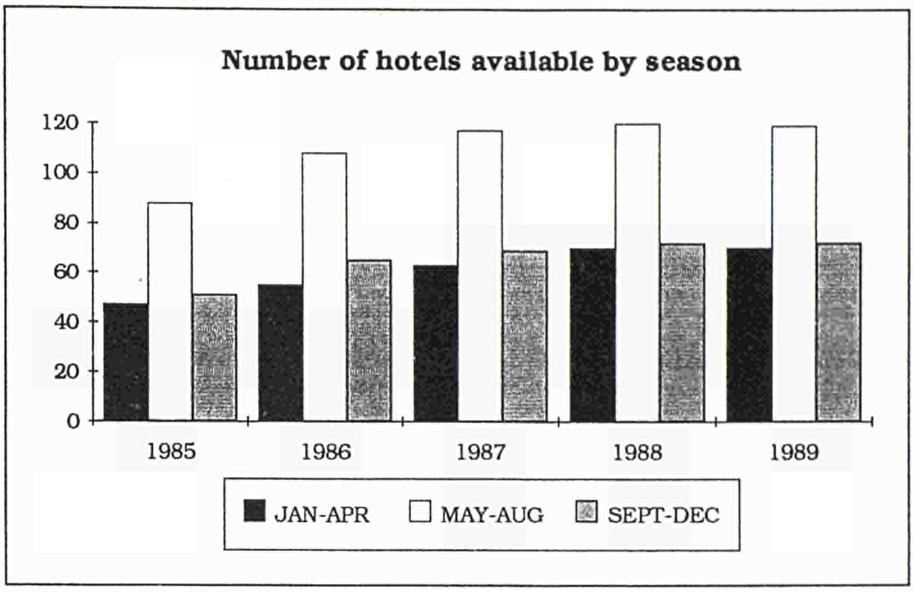


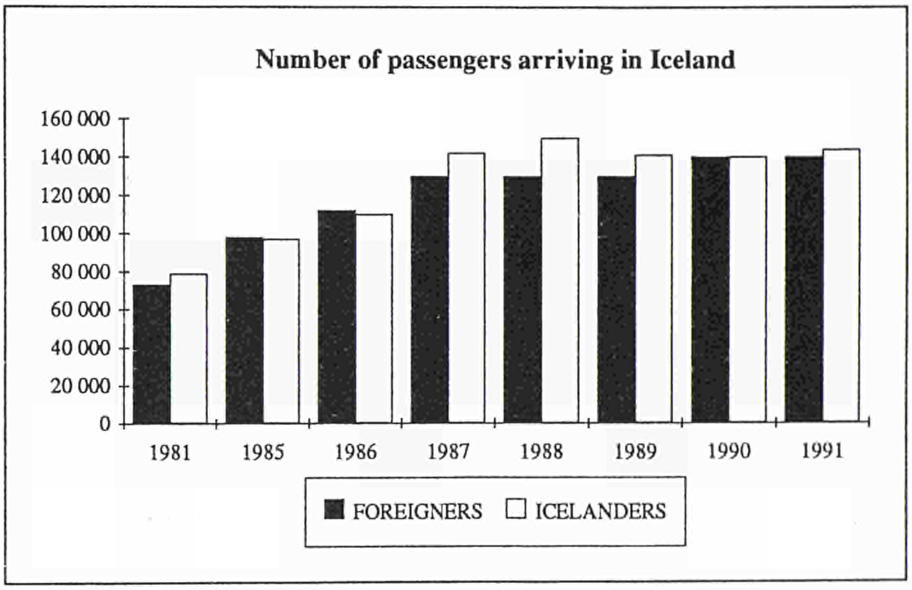


Kingdom (5.2%), and Norway (4.3%). The 1991 figures are, however, lower than those for 1986: Sweden (26.8%), Germany (14.7%), Norway (7.8%), United States (7%), and United Kingdom (4.7%).

Visitors to Finland enjoy both summer and winter seasons. Average seasonal net occupancy rates for 1991 confirm that the difference in demand for rooms in hotels and similar establishments between winter (38%) and summer (47.7%) was not as hig as expected. July usually has th highest monthly room occupanc rate (1988-1991). However : 1980, 1986, and 1987 the highe rates were recorded in Septen ber.

General Situation and Key Indicators: Development and Impact of Tourism





Iceland's small but open economy witnessed an extraordinary expansion of its service sector, including tourism, during the 1980s. Tourism is expected to develop even further in the coming years.

International tourism receipts during 1987-1991 rose by 25.6% from ECU 74.5 million in 1987 to ECU 93.6 million in 1991. Service receipts in 1992 were affected by a slight downturn in tourist arrivals in 1992 (-0.6%). However, tourist arrivals in 1991 were more than double the 1980 level.

International tourism expenditure rose by 29% to ECU 238 million in 1991 from ECU 184.6 million in 1987 as Icelanders spent more abroad than foreigners did in Iceland.

The development of tourism raised the share of employment in trade, restaurant, and hotel services in total service employment.

Tourist arrivals by air increased by 8.8% between 1987 and 1991. In 1989 only 4.2% of all inbound tourists arrived by sea, and the proportion has remained almost unchanged (4.3% in 1992).

The number of available hotels, rooms, and bedplaces grew during 1986-1992. The increase in hotel availability during the main tourist season (May-August) was 31%, compared with 36% and 34% for rooms and beds, respectively.

Inbound tourists, who constitute almost half the tourism demand, come mainly from Germany (15.7% in 1991), followed by Sweden (11.4%), United Kingdom (10.2%), and Denmark (9.6%). The number of visitors from Europe increased by 30% during 1987-1991.

Tourism Supply

Summer (May-August) is the main tourist season in Iceland. Hotel availability varies during the year; in 1989, 119 hotels were available in summer, 72 during September-December, and 70 during January-April.

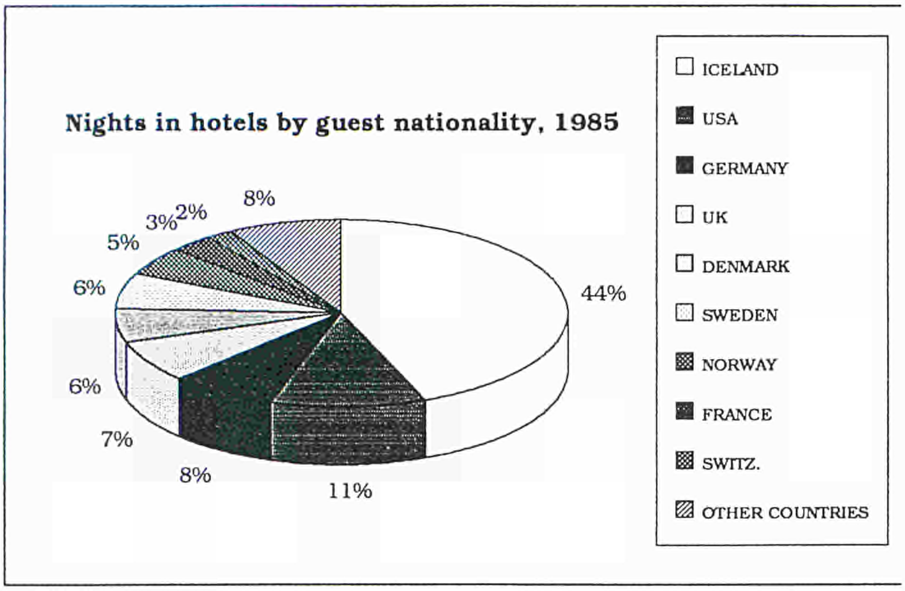
Room availability is also highest in summer. In 1989 there were 3 368 rooms in summer (May-August), compared with 2 023 rooms during September-December and 1958 during January-April.

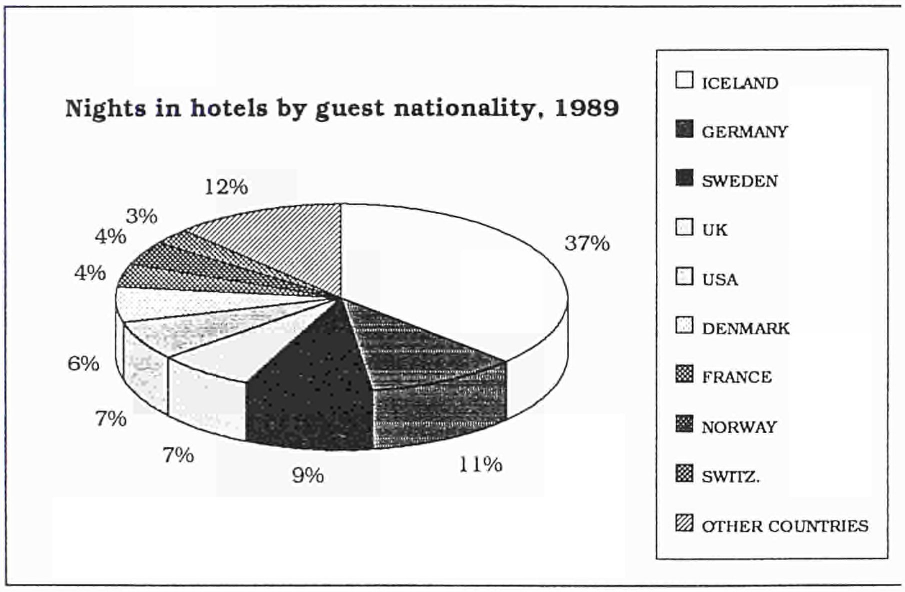
Growth rates for hotel availability between 1985 and 1989 also varied according to the time of year: 49% for January-April, 41% for September-December, and 35% for summer.

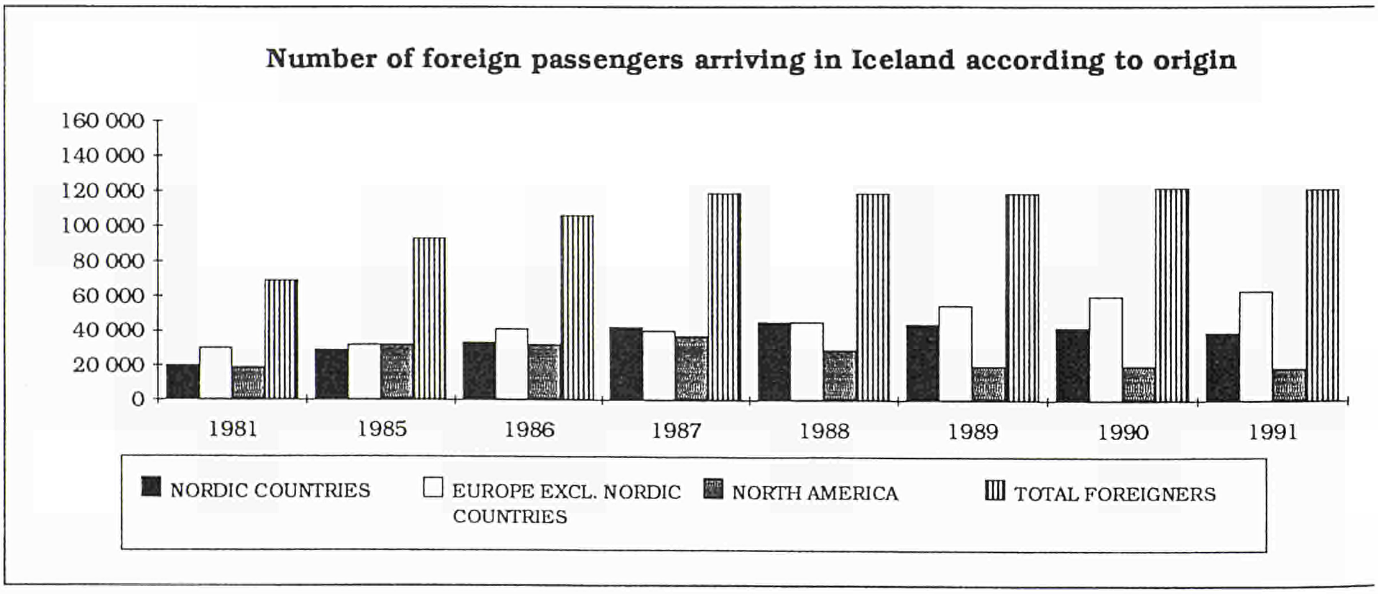
The same pattern was observed in growth rates for room and bedplace availability during 1985-1989. The rates were highest for January-April (56% for rooms, 57% for bedplaces), followed by September-December (52% for rooms, 53% for bedplaces) and May-August (33% for rooms, 31.5% for bedplaces).

Tourism Demand

Tourism demand grew during the 1980s, and the number of inbound tourists increased by 118%.







Icelanders travel extensively for business and leisure. They ac-counted for almost half the arrivals in 1991 (148 854 out of 292 312 arrivals). The number of Icelanders returning to their country from abroad increased by 115% between 1980 and 1991.

Visitors from Europe, excluding the Nordic countries, constitute the largest percentage (49.9% in 1991) of inbound tourists. The Nordic countries (Denmark, Norway, Sweden, Finland) represent the second largest region of residence of inbound tourists (31% of foreign visitors).

The number of nights spent in hotels has increased steadily from 449 007 in 1985 to 602 120 in 1989 (+34%). The nonresident share rose from 58% in 1985 to 63% in 1989.

Most non-resident guests come from Europe. The relative share of nights spent in 1989 according to the main countries of residence were: Germany (11%), Sweden (9%), and United Kingdom (7%). The United States, which used to rank first (11% in 1985), has since dropped to fourth place (7% in 1989).

The highest occupancy rates are recorded in summer (May-August) for rooms (approximately 65%) and bedplaces (approximately 54%). Bedplace occupancy rates for September-December and January-April were 33% and 31%, respectively.

During the past few years, the government of the Principality of Liechtenstein has sought to establish a new tourism law. Its aim is to increase involvement of private companies, especially those benefiting either directly or indirectly from tourism. The proposed law would impose higher quality standards and a fixed yearly contribution to the Liechtenstein National Tourist Office. But in June 1992 the Liechtenstein parliament rejected the law, and the original law of 1971 still remains in force.

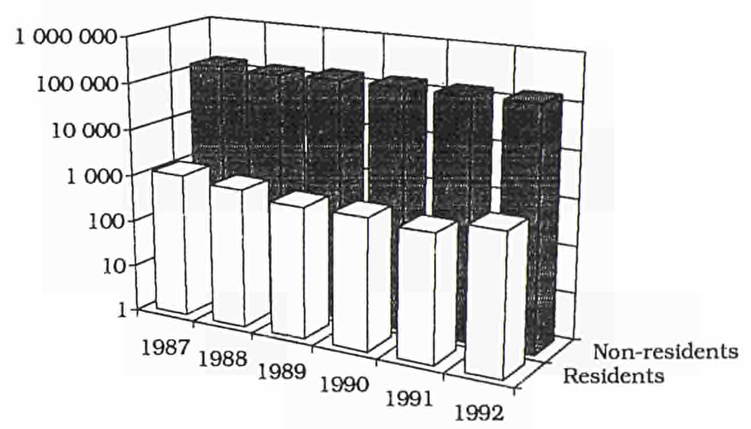
Industry and trade together employ about half the Liechtenstein workforce. The tourism sector employs about 6-7%, including 4% in hotels and restaurants.

The total number of tourists (overnight visitors) decreased by 15%, from 85 033 in 1980 to 72 000 in 1992. Demand has decreased partly as a result of competition from exotic destinations, for which cheap tours are offered in those markets that used to be the main source of tourists to Liechtenstein. On the supply side, there was a a general reduction in the number of accommodations. The total number of bedplaces in hotels and similar establishments dropped from 1 570 in 1985 to 1 289 in 1992.

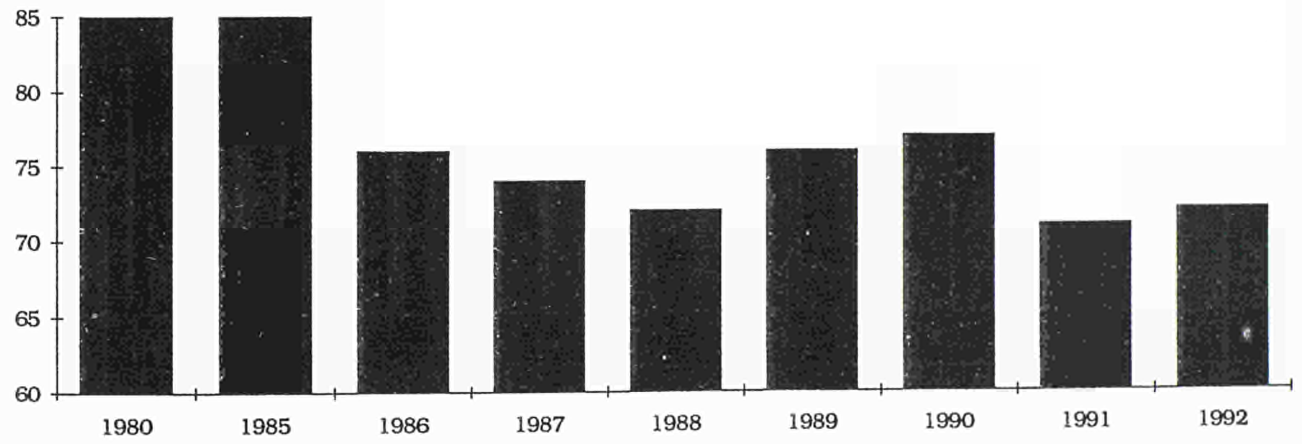
The number of bedplaces has declined as hotels have been converted into more lucrative office facilities. High real estate prices and strict laws on working permits for workers from other countries (practically all employees in Liechtenstein's hotel and catering sector are foreigners) have checked the construction of new hotels.

Contraction in the tourism sector in Liechtenstein is confirmed by an analysis of tourism demand. During 1987-1992, demand for accommodation in hotels and similar establishments decreased from 152 951 nights in 1987 to 148 218 nights in 1992. Domestic demand remained steady at

Nights spent by residents and non-residents in hotels and similar establishment



Tourist arrivals ('000)



1 000 nights. The general reduction in total accommodation demand can therefore be attributed to a drop in nonresident demand. One of the reasons is the 10% currency appreciation in 1986, which reduced price competitiveness.

The average length of stay was shorter in hotels (2.1 nights in 1980; 2.0 in 1992) and private rooms (5 nights in 1980; 2.9 in 1992) as the total number of overnights fell more sharply than the number of arrivals. The number of available apartments and private rooms also decreased because fewer people depend on the extra income earned from renting rooms in their homes.

The highest proportion of tou ists come from neighbourin Switzerland and Germany; thes tourists also prefer Liechtenstei as it is germanophone. Germa and Swiss tourists together ac count for more than 60% of tot accommodation demand. In 199 Germans accounted for 36% o total demand and the Swiss, 30%.

eurostat

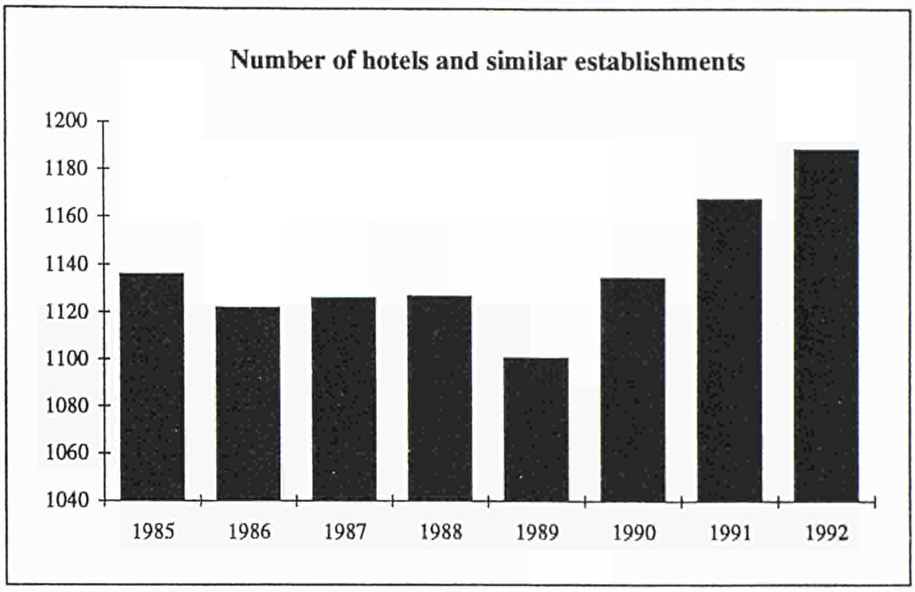
General Situation and Key Indicators: Development and Impact of Tourism

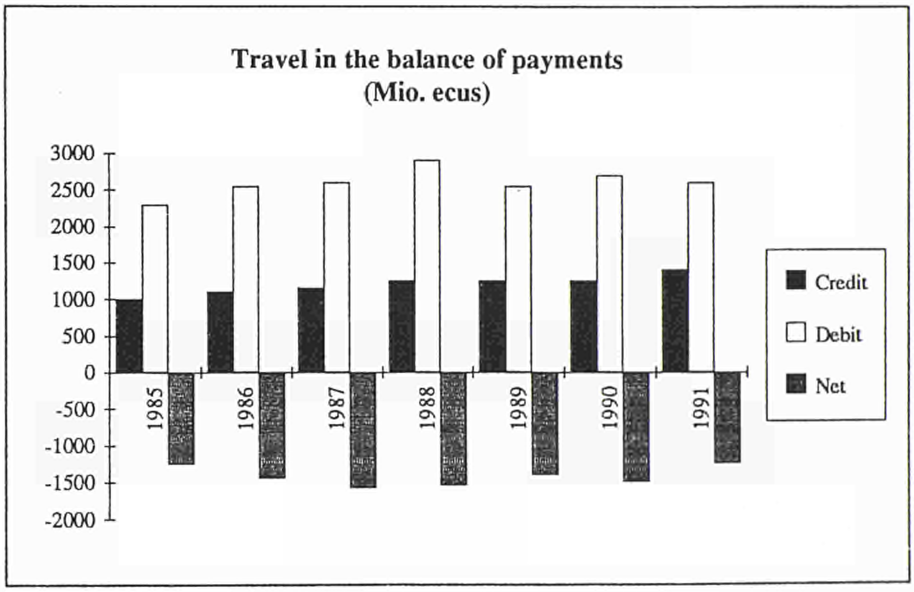
Norway is not a standard destination for inbound tourists, nor is tourism a key sector for the economy. Foreigners account for only 32% of tourism demand. Value-added generated by tourism was 1.7% of the gross domestic product (GDP) in 1991. Tourism is roughly half as important for the Norwegian economy as is agriculture and its share is decreasing owing to unfavourable price competitiveness.

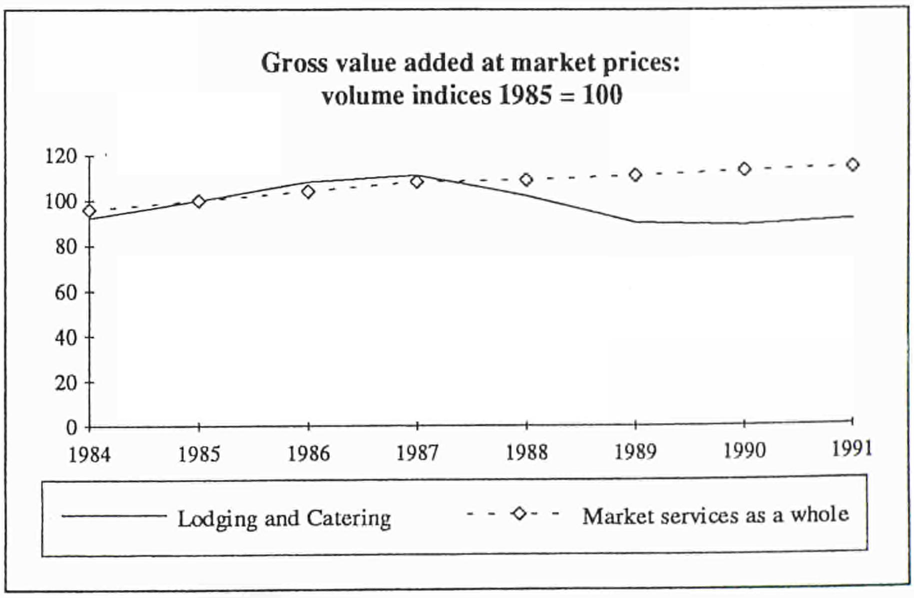
However, recent changes in tourism have produced a positive impact. The total number of inbound tourists increased from 1.8 million in 1985 to 2.1 million in 1991. The number of outbound tourists decreased by 34%, from 587 000 in 1985 to 384 000 in 1991.

The balance of payments for travel has always been negative, but the deficit rate has slowed since 1987, due to a lower growth rate in international tourism expenditure. Norwegian tourists spent less in other countries because the 10% devaluation of the Norwegian krone in May 1986 eroded personal disposable income. The services balance, which has been negative since 1986, has not improved. The net account for all economic sectors also remains negative.

International fare receipts for sea and air transport on Norwegian







carriers contributed substantially to value-added of tourism. However, the transfer of most Norwegian cruise ships to open-registry countries has diverted receipts away from Norway.

The combined gross output of lodging, restaurant, and catering services increased by 35% between 1985 and 1990. Gross output from the hotel trade accounted for 25% of the total for the whole category in 1990; its growth was lower than that of restaurants and similar establishments.

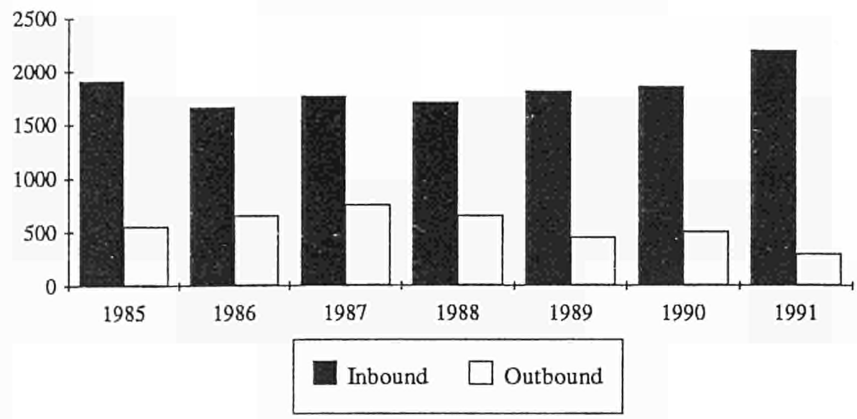
Tourism Supply

The total number of hotels and similar establishments was 1 136 in 1985; it dropped to 1 101 in 1989 and rose again to 1 189 in 1992. The total number of rooms and bedplaces increased steadily during 1985-1991, which indicates expansion and quality improvement in the sector.

Between 1985 and 1990, the total number of restaurants and bar-restaurants increased from 3 289 to 4 370. This 5.8% average annual growth is higher than that in the total number of hotels and similar establishments. The number of travel agencies totalled 688 in 1990. However, no other data were available to analyze changes in this sector.

Air and road transport grew steadily, while railways underwent a period of crisis.

Inbound and outbound overnight visitors ('000)



Transport infrastructure

Railways

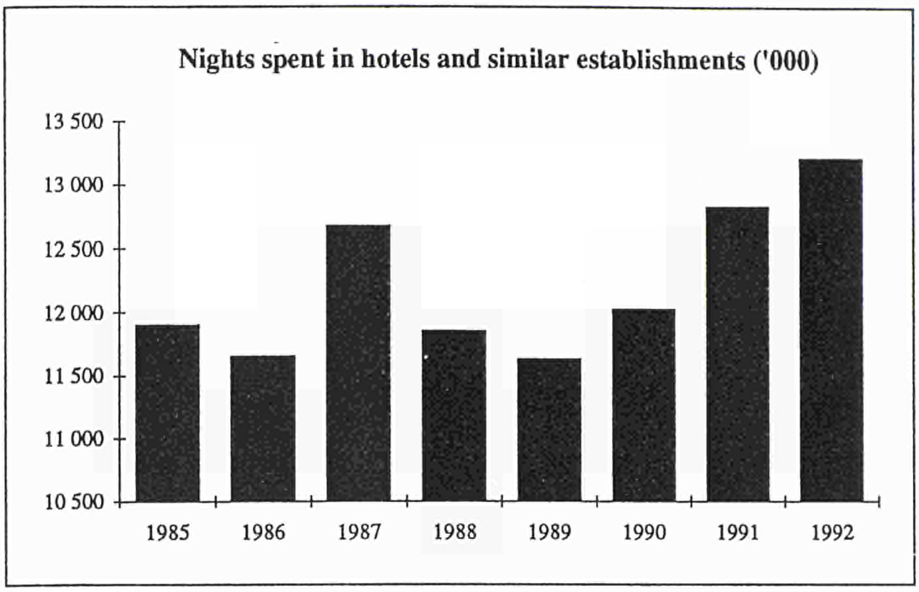
	1985	1986	1987	1988	1989	1990	1991	19[illegible]
Length of lines (km)	4 242	4 216	4 217	4 175	4 044	4 044	4 027	4 0[illegible]
Passengers carried (Mio.)	35	36	37	34	34	34	33	[illegible]
Passenger-km (Mio.)	2 240	2 225	2 181	2 116	2 136	2 136	2 153	2 2[illegible]

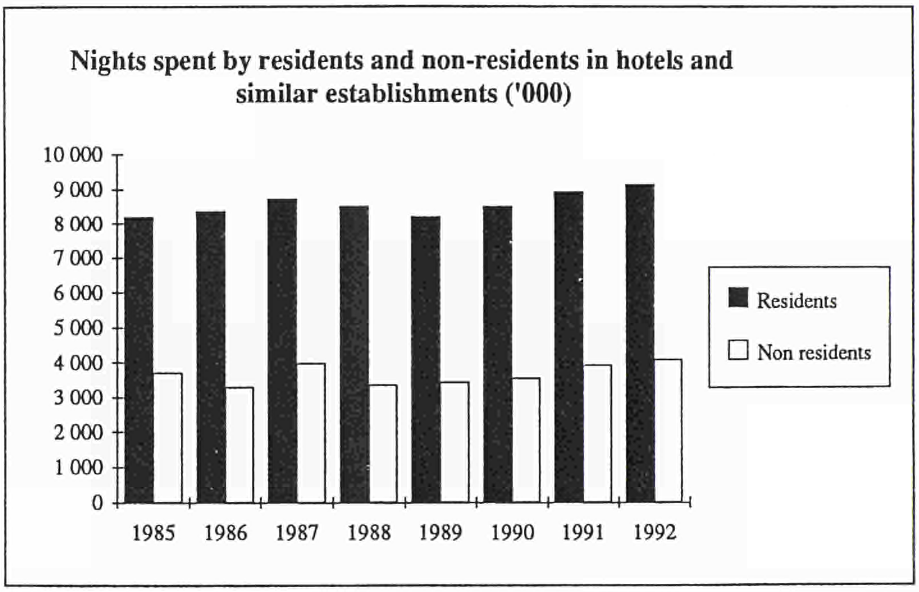
Road

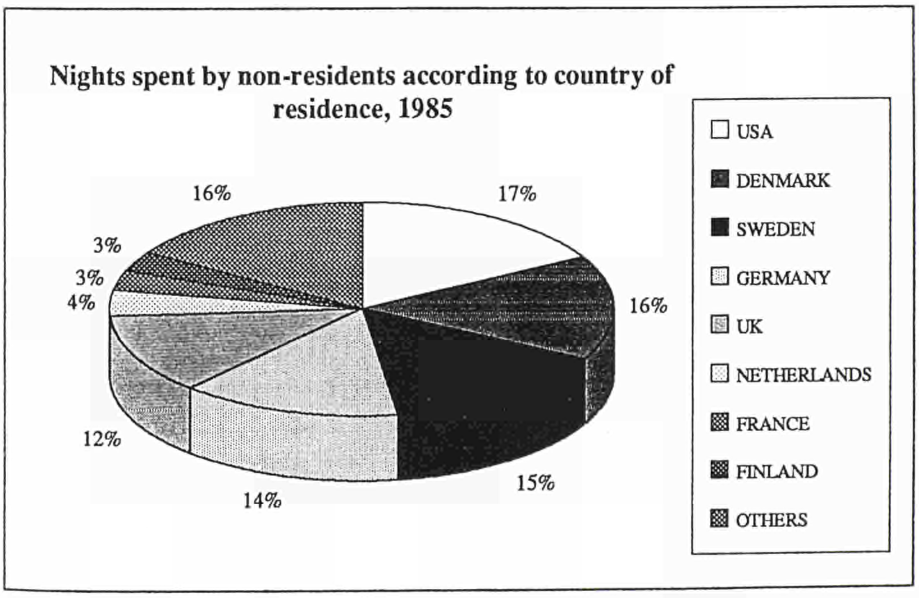
	1985	1986	1987	1988	1989	1990	1991	19[illegible]
Motorways (km)	325	336	345	352	363	395	410	4[illegible]
Stock of buses and coaches	17 082	18 278	19 204	19 771	20 199	21 222	23 288	26 7[illegible]
Cars (1000)	1 513	1 592	1 623	1 622	1 613	1 613	1 615	1 6[illegible]
Cars per 1000 inhabitants	365	382	387	385	382	380	378	3[illegible]

Aviation

	1985	1986	1987	1988	1989	1990	1991	19[illegible]
Aircraft movements - all (1000)	732	795	886	892	871	870	825	8[illegible]
Total passengers (1000)	13 416	14 268	15 688	16 036	15 438	16 332	16 063	17 4[illegible]







The total number of air passengers increased by 30% between 1985 and 1992. The number of plane movements increased from 1985 to 1988, then gradually dropped until 1992. But the overall trend for the entire period (1985–1992) revealed growth of approximately 11% in plane movements.

The motorway network expanded from 325 km in 1985 to 437 km in 1992. Total number of buses and coaches increased significantly. Although the total number of cars remained steady, the number per 1 000 inhabitants fell slightly.

The number of rail passengers decreased by 5.7% between 1985 and 1992. The length of lines decreased by 215 km, due to the closure of old, nonprofitable parts of the network. Total passenger kilometres dropped from 2 241 in 1985 to 2 150 in 1991, but the number improved significantly in 1992.

Tourism Demand

The total number of nights spent in tourism accommodation establishments rose from 17 978 in 1985 to 18 716 in 1991. Demand rose between 1985 and 1987, dropped in 1988/89, and climbed again in 1990. The fall in 1988/89 was linked not only to a drop in resident demand, but also a change in definition (from 1988 onwards, data exclude refugees).

Campsites hold a high share (41%) of nights spent in tourism accommodation establishments. Residents make up most (58.5%) of this demand.

Resident demand accounted for 69% of total accommodation demand in 1992. Growth rates for resident and nonresident demand were the same during 1985-1992, except in 1989 when a fall in personal disposable income depressed resident demand.

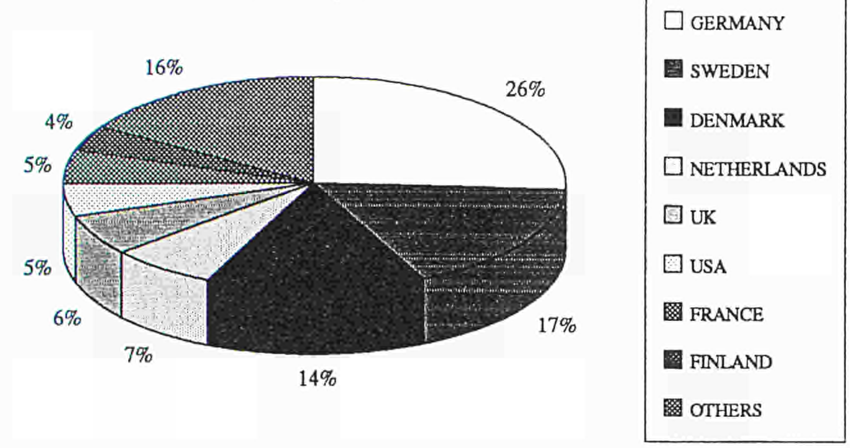
A breakdown of nonresident guests in tourism accommodations by their country of residence shows that, in 1991, visitors from Germany held the largest share (26%), followed by Sweden (17%), and Denmark (14%). The United States (5%) ranked first among the non-European countries, followed by Japan (1.4%). During the 1980s nonresident accommodation demand increased by 151%, mainly due to a 250% increase in German demand.

The net annual occupancy rate (bedplaces and rooms) steadily decreased over the years because of a widening gap between supply and demand. Seasonal patterns can be determined from monthly occupancy rates. In Norway the peak season is in summer, from June to September.

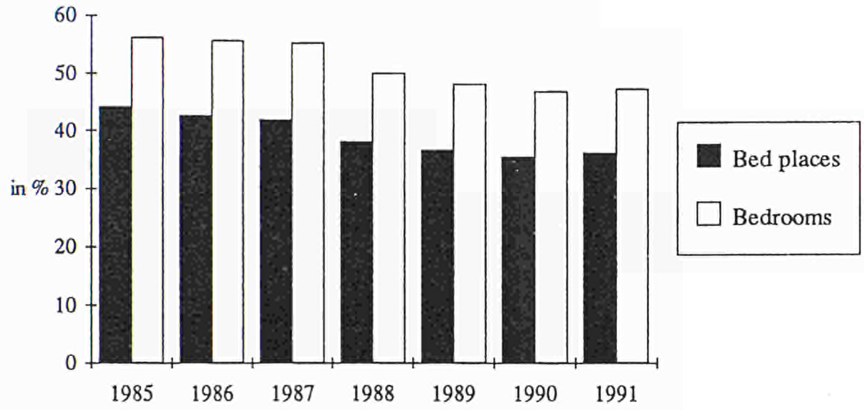
Reduced purchasing power of the national currency and lower personal disposable income discouraged Norwegians from spending their holidays abroad. The departure rate fell from 74% in 1982 to 54% in 1987 due to the devaluation of the Norwegian krone in 1986.

Norwegian residents travel mainly by car. They prefer hotels and similar establishments and their demand accounts for 69% of the total accommodation demand in Norway. Their preferred international destinations are: the United Kingdom (1.7 million), Sweden (1.5 million), and Denmark (1.0 million). Only one-tenth of Norwegians chose southern Europe (Italy, Greece Spain, and Portugal) as a holiday destination.

Nights spent by non-residents according to country of residence, 1991



Annual occupancy rates for bedplaces and bedrooms in hotels and similar establishments



General Situation and Key Indicators: Development and Impact of Tourism

Sweden's tourism industry grew steadily through most of the 1980s. The industry caters extensively to the domestic market; foreign visitors account for only about one-fifth of the nights spent in accommodation establishments.

Sweden is largely a tourism-generating country, with a substantial excess of international tourism expenditure over receipts from foreign visitors. Expenditure grew by 81% during the second half of the decade according to. balance of payments figures for travel (tourism). In 1991 it reached ECU 4 932 million, which is more than twice the total for Sweden's international tourism receipts (ECU 2 202 million). Sweden's negative travel balance with the world deteriorated further by 400% (ECU -2 730 million in 1991), compared with 1980.

Total turnover for lodging, catering, and restaurants in 1991 was ECU 6 280 million (at constant prices), which represents an increase of 40% since 1980. Two-thirds of the turnover was generated by restaurants and other catering services, and the remaining one-third by the accommodation sector.

The share of lodging and catering services in total gross value-added (at market prices) generated by market services as a whole stayed relatively stable between 1984 (1.2%) and 1990 (1.3%), with a peak in 1989 (1.5%). The share of persons occupied in the sector during the same period increased steadily from 2.9% to 3.3%.

Statistics on arrivals at frontiers do not exist in Sweden. However, rough estimates calculated from different administrative sources indicate that travel to and from Sweden has increased. The number of arrivals by sea, air, and rail rose from 20.5 million in 1980 to 22.7 million in 1988 (11%).

The upward trend in the total number of overnights during 1980-1989 was checked in the early 1990s. The downturn can be explained by inflation and high VAT rates, which made Sweden an expensive tourist destination. But the devaluation of the Swedish krona following the 1992 foreign exchange crisis, and the 1993 cut in VAT on tourist services in Sweden have improved prospects for the tourism industry.

Transport infrastructure

Railways

	1980	1985	1986	1987	1988	1989	1990	1991	1992
Length of lines (km)	12 006	11 745	11 745	11 673	11 555	11 501	11 211	11 045	10 210
Passengers carried (Mio.)	95	90	86	83	87	87	88	88	87
Passenger-km (Mio.)	7 019	6 803	6 363	6 215	6 289	6 211	6 189	5 634	5 362

Road

	1980	1985	1986	1987	1988	1989	1990	1991	1992
Motorways (km)	809	898	901	901	901	926	929	939	1 005
Stock of buses and coaches	12 796	13 664	13 779	13 246	14 106	14 530	14 595	14 555	14 252
Cars (1000)	2 883	3 151	3 253	3 367	3 482	3 578	3 600	3 619	3 586
Cars per 1000 inhabitants	347	377	389	400	411	419	419	418	416

Tourism Supply

A trend towards larger enterprises was observed in tourism accommodation establishments as the growth rate in the number of hotels was 12% (1 628 in 1980, 1 828 in 1991), compared with 49% in the number of bedplaces.

As hotel supply outstripped demand, occupancy rates (bedplaces or rooms) declined from 38% in 1980 to 27% in 1991.

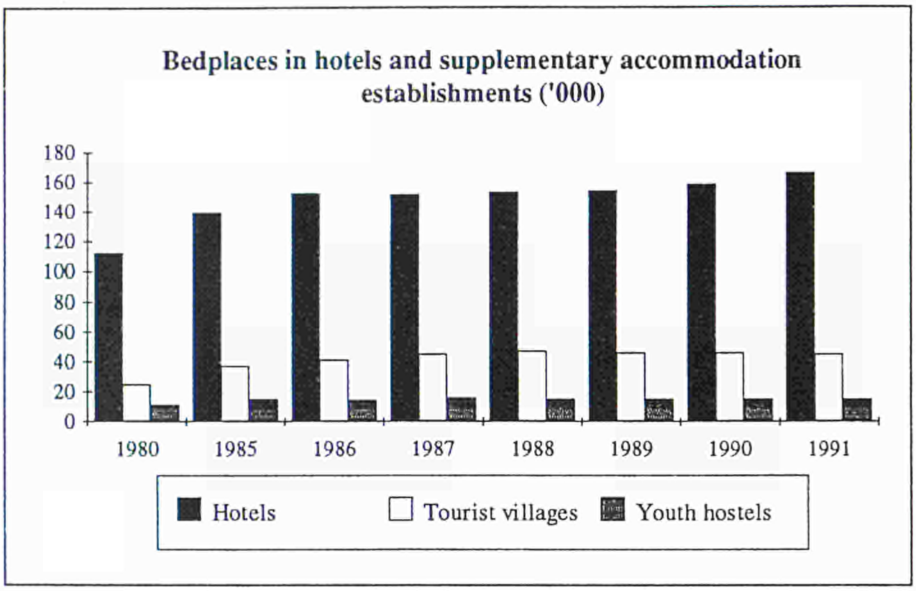
Supply of other types of accommodation establishments also increased during the 1980s. The number of campsites, tourist villages and youth hostels rose from 1 009 in 1980 to 1 409 in 1991 (+40%). Many of these establishments are, however, seasonal and operate only during limited periods of the year.

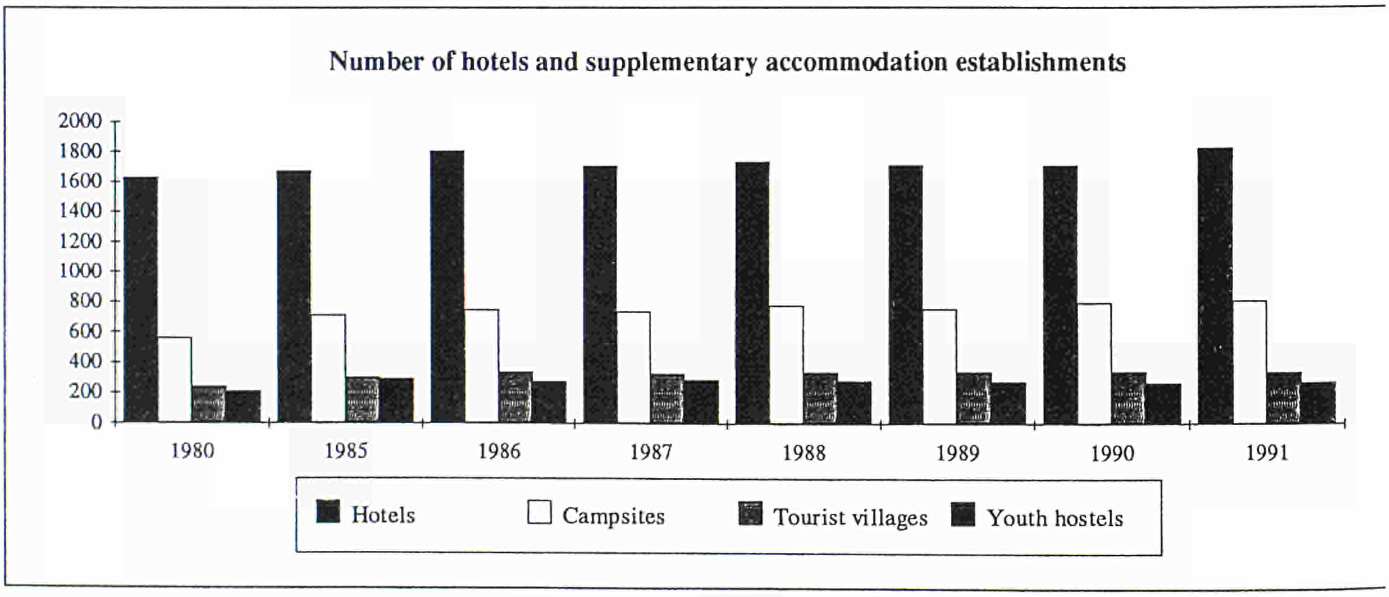
Other kinds of tourist supply activities also grew. The number of restaurants and cafés rose by 75%, from 7 055 in 1980 to 12 363 in 1991. The number of travel agencies more than doubled, while the number of libraries, museums, and similar cultural establishments rose by 29%.

Road transport developed more rapidly than rail transport.

Length of motorways has increased by 16% since 1980 to 1 005 km in 1992. The number of buses and coaches rose by 12% and that of cars by 25%. In 1992 there were 416 cars per 1 000 inhabitants (+20% since 1980).

Rail transport has declined steadily since 1980. The railway network was reduced from 12 006 km in 1980 to 10 210 km in 1992. The number of rail passengers also decreased, from 95 million in 1980 to 87 million in 1992. The number of passenger kilometers fell by almost 24% over the same period.





Tourism Demand

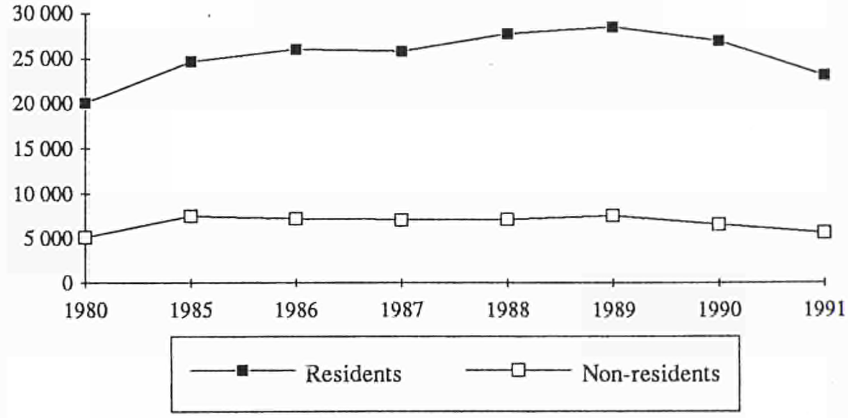
An analysis of nights spent in tourism accommodation establishments reveals that demand rose by 44% between 1980 and 1989, the year when it reached a peak. It declined by 20% during 1990-1991 and fell to the same level as in 1984. This trend was also observed, with some variation, for all types of accommodations.

Hotels and campsites are the main types of accommodation establishments in Sweden. Nights spent in hotels account for about 50% of the total, compared with 35% at campsites.

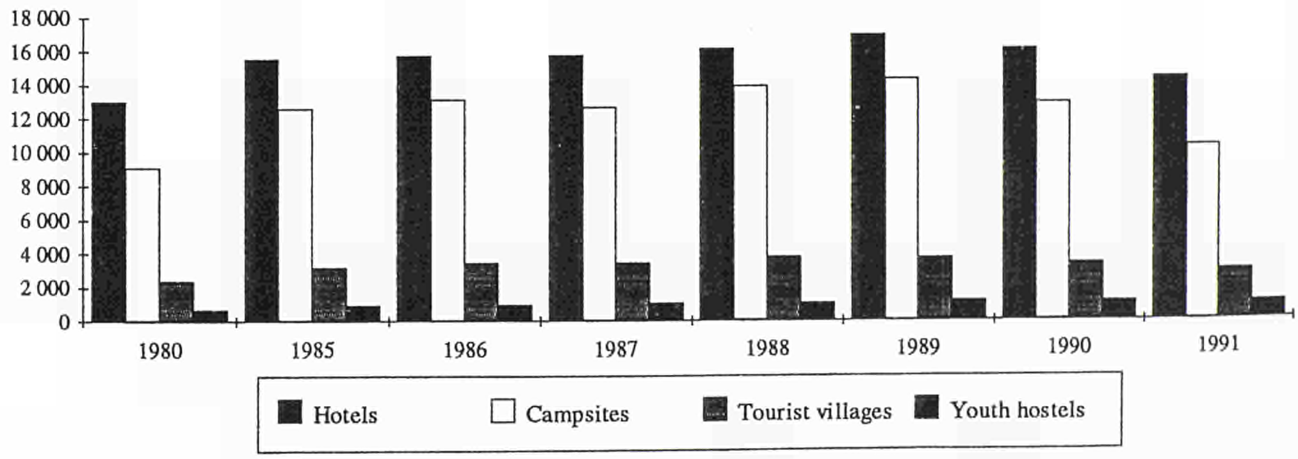
Swedish residents account for 80% of the demand for tourism accommodation establishments. The fluctuations described earlier are caused mainly by the tourism pattern of residents. The number of nights spent by nonresidents varied by only a few percentage points during 1983-1989. It declined by 26% in the two following years.

Nights spent by residents and non-residents by type of accommodation - 1991 ('000)

Nights spent by residents and non-residents in accommodation establishments('000)



Nights spent in different accommodation establishments ('000)

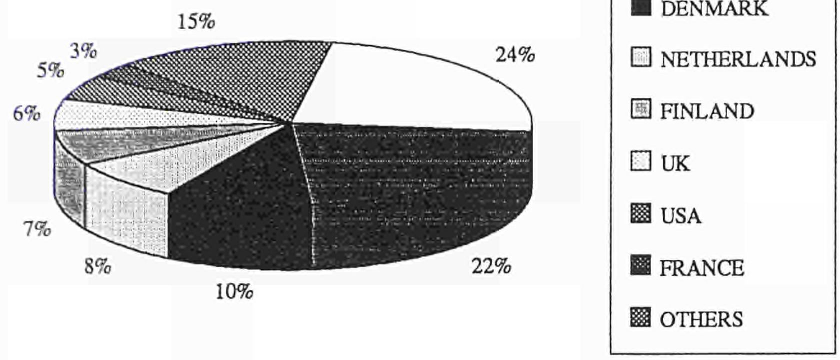


In 1980 hotels accounted for 52% of the nights spent by non-resident tourists, compared with 37% at campsites. In the following years the number for campsites grew faster than for hotels, and in 1989-the peak year-the distribution evened out at 43% for campsites and 44% for hotels. In the early 1990s campsites lost more nonresident guests than hotels did and in 1991 the distribution was about the same as in 1980. Tourist villages and youth hostels received only about 10% of the nonresident tourists during the 1980s.

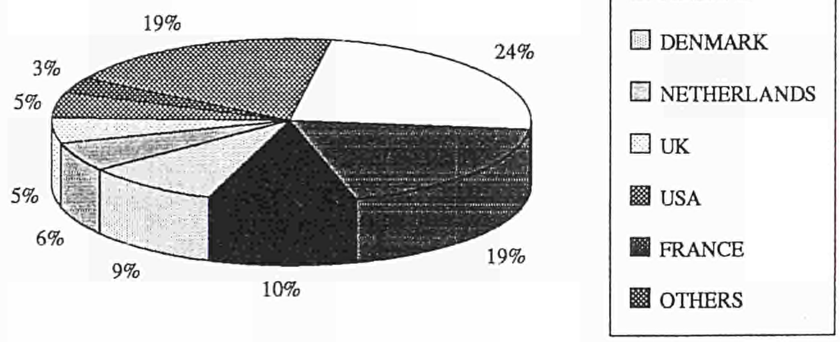
Scandinavian tourists, mainly Norwegians, have always formed the dominant group among non-resident tourists. However, the number of nights spent by Norwegians has almost halved since 1987. In 1991, for the first time, the largest share in nights spent by nonresidents was held by Germany (24%), followed by Norway (19%), Finland (10%), and Denmark (9%). Tourists from The Netherlands, the United Kingdom, and the United States, each held a share of about 5%.

Seasonal net bedplace occupancy rates for hotels show that summer months (June-August) are busier than winter months (November-February). In 1991 summer rates reached 32%, compared with 22% in winter. Both summer and winter occupancy rates have steadily decreased from their 1980 peaks of 45% and 32%, respectively.

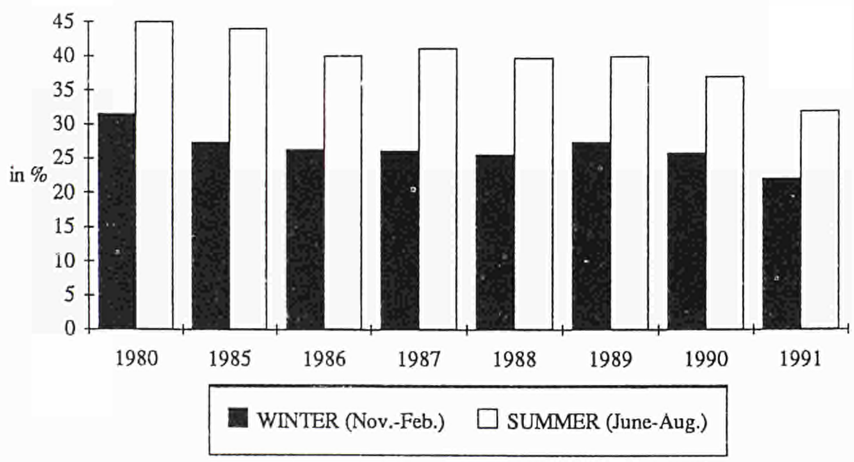
Nights spent by non-residents according to country of residence, 1980



Nights spent by non-residents according to country of residence, 1991



Average seasonal bedplace occupancy rates for hotels



SWEDEN

About 75% of leisure and holiday trips and 65% of business trips by Swedish residents are made within the country. About one-fifth of all travel, including over-night stays (70 million nights), is undertaken for business.

Most outbound Swedes prefer other Scandinavian countries as tourist destinations. About 60% of all leisure trips are bound for Denmark, Finland, or Norway. The most frequent destination outside Scandinavian countries is Germany (8%), followed by Spain, Canary islands, and Greece. Scandinavian countries are also the main destination for business trips (35%). Germany (15% of trips) ranks first among non-Scandinavian destinations, followed by the United Kingdom (9%).

General Situation and Key Indicators: Development and Impact of Tourism

Switzerland's beautiful, unpolluted landscape makes it one of the most attractive holiday destinations. Tourism is an important sector for the Swiss economy. During the 1980s it contributed nearly 8% to the gross domestic product (GDP), the same as the construction and civil engineering sector.

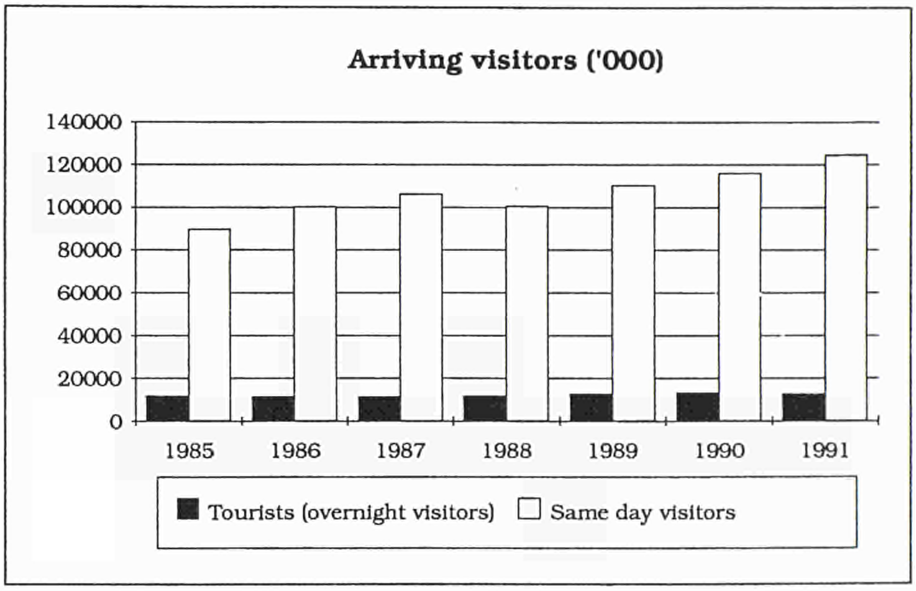
Although the total number of arrivals increased from 101 million in 1985 to 137 million in 1991, that of tourists (overnight visitors) increased by only 6%. Overnight visitors account for only 9% of arrivals because of the high proportion of same-day visitors. Foreign tourists represent almost half the total accommodation demand.

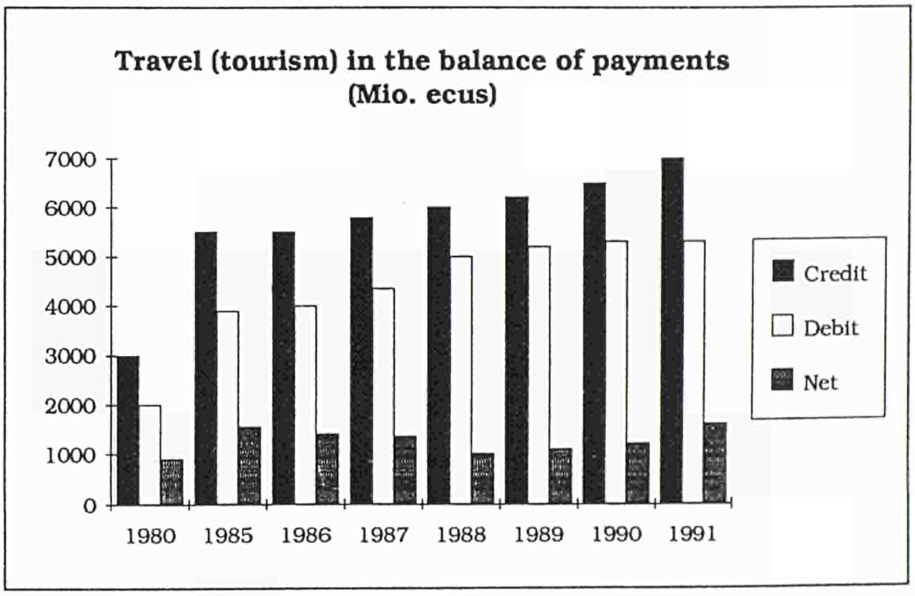
Although Switzerland's balance of payments shows a growing negative net balance for all economic sectors, its travel balance has always been positive because inbound tourism exceeds outbound tourism. The growth rate for the net travel balance has, however, fluctuated over the years; it rose by 17% between 1980 and 1986, fell by 32% in 1987/88, and climbed again in 1991. The rise since 1989 is due to the 11% increase in international tourism receipts as a result of higher personal disposable income in the OECD countries and improved price competitiveness in Switzerland.

The share of lodging and catering services in gross value-added (at constant prices) grew by 190% between 1975 and 1990, while the gross domestic product (GDP) increased by 240%. Value-added of lodging and catering services as a percentage of GDP in 1989 was therefore only 8%. The same trend was observed in the trade and food sectors.

Tourism Supply

In 1990 the 100 000 tourism accommodation establishments in Switzerland (hotels, campsites, social tourist accommodation, and others) offered approximately 1.1 million bedplaces. During 1985–1991 both the number of rooms and bedplaces in hotels and similar establishments fell by 3%. The total number of bedplaces also decreased in supplementary accommodation





establishments, except social tourism accommodation establishments and campsites. The ratio of bedplaces in hotels to those in supplementary accommodations remained stable.

Holiday dwellings (*Ferienwohnungen*) grew in number during the 1980s. They are not usually included in official tourism statistics, but they are of significant importance to domestic tourism and winter season tourism.

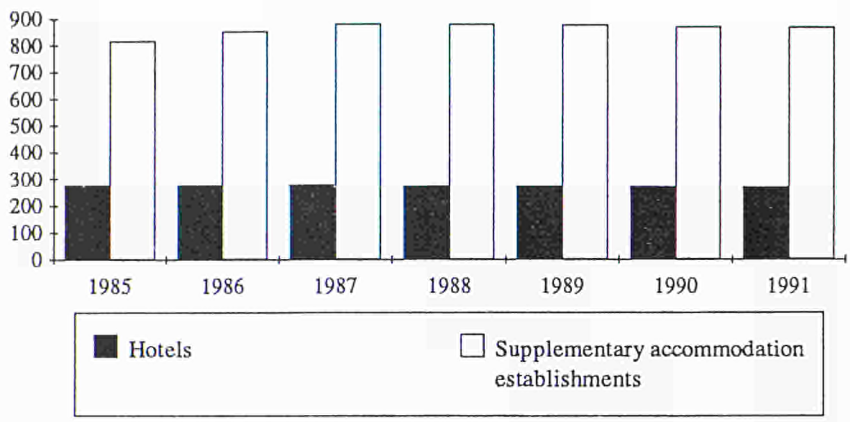
The number of enterprises involved in nonaccommodation tourist activities (restaurants, travel agencies, car rentals) grew during the 1980s. Growth rates were: 2% for restaurants, 5.6% for car rentals, and 6.5% for travel agencies.

Rail and road transport recorded appreciable growth rates.

During 1980-1991 the number of rail passengers rose by 22%. Length of lines increased by 2%. There was no cutback in investment, as in Austria; instead, existing capacity was improved. These positive developments in rail transport raised passenger kilometres by 20%.

Motorways were expanded and totalled 1 520 km in 1992. The absolute number of cars increased by 30%. The number of cars per 1 000 inhabitants increased from 355 in 1980 to 454 in 1992. Swiss tourism, like Austrian, is strongly linked to the development of road transport, as a large share of visitors come to Switzerland by car. The government has therefore invested heavily in the development of an efficient road system.

Bed-places in hotels and supplementary accommodation establishments ('000)



Transport infrastructure

Railways

	1980	1985	1986	1987	1988	1989	1990	1991	1992
Length of lines (km)	2 926	2 969	2 969	2 969	2 972	2 972	2 982	2 982	2 985
Passengers carried (Mio.)	216	225	228	237	259	260	264	271	268
Passenger-km (Mio)	9 179	9 381	9 325	9 810	10 803	11 033	11 060	12 383	11 831

Road

	1980	1985	1986	1987	1988	1989	1990	1991	1992
Motorways (km)	1 170	___	___	___	___	___	1 495	1 502	1 520
Stock of buses and coaches	11 087	11 428	11 473	12 600	13 731	13 488	13 595	13 392	13 509
Cars (1000)	2 246	2 617	2 678	2 712	2 761	2 899	2 993	3 065	3 098
Cars per 1000 inhabitants	355	405	412	415	419	436	446	452	454

Tourism Demand

Switzerland's reputation is built on its scenic and unpolluted landscape. For this reason, accommodation demand is higher in mountain and lake resorts than in cities.

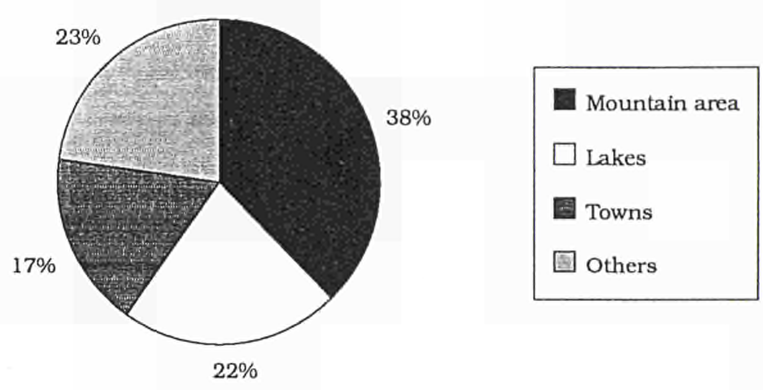
During the 1980s, the total number of nights spent in accommodation establishments increased from 75.2 million in 1980 to 78 million in 1991. Growth rates were low until 1988. The situation has improved since 1989 because of successful marketing, higher personal disposable incomes in other OECD countries, and improved price competitiveness of Swiss resorts.

A breakdown of accommodation demand during the 1980s shows an increase of 3.7% for hotels and of 8% for campsites. Only social tourism accommodation demand decreased slightly (–0.3%).

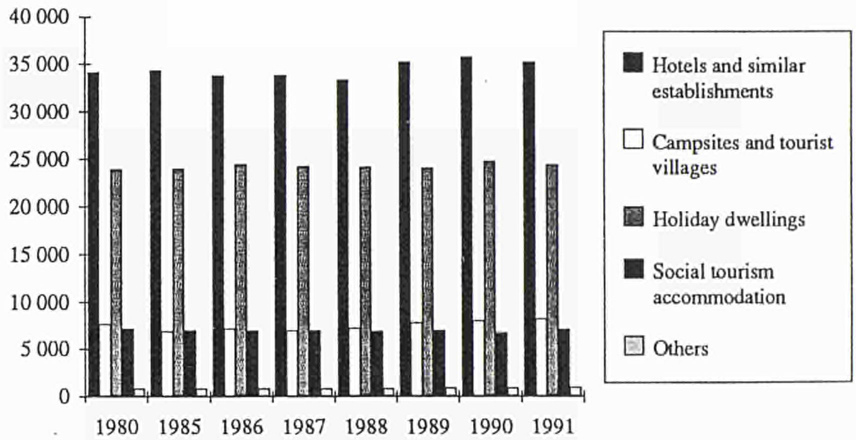
Nonresident demand increased by 2.8%, compared with 4.3% for residents. In 1991 resident demand accounted for 50.3% of total Swiss accommodation demand. However, resident demand could have been higher than usual in 1991 because of the 700-year celebrations and a lower number of foreign tourists due to the Gulf war.

Residents prefer campsites, social tourism accommodations, and holiday dwellings. In 1991 resident demand accounted for 46% of nights spent in hotels, compared with 75% for camp-

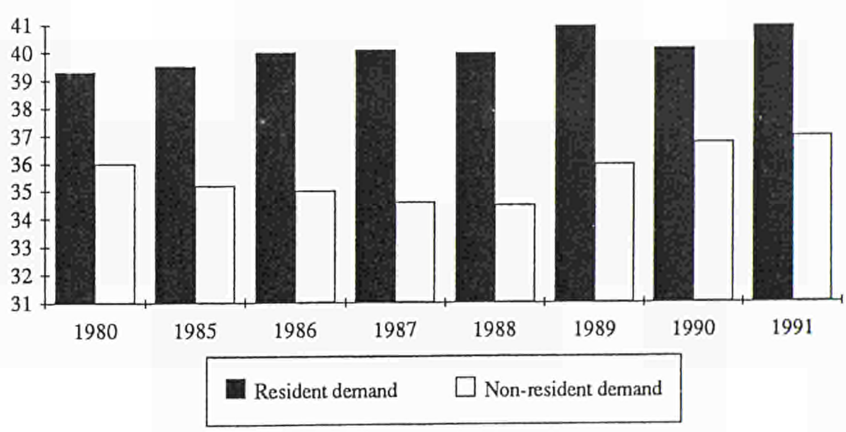
Accommodation demand by area-type, 1991



Nights spent in accommodation establishments ('000)



Nights spent by residents and non-residents in accommodation establishments (Mio.)



sites, 73% for social tourism accommodation establishments, and 55% for holiday dwellings.

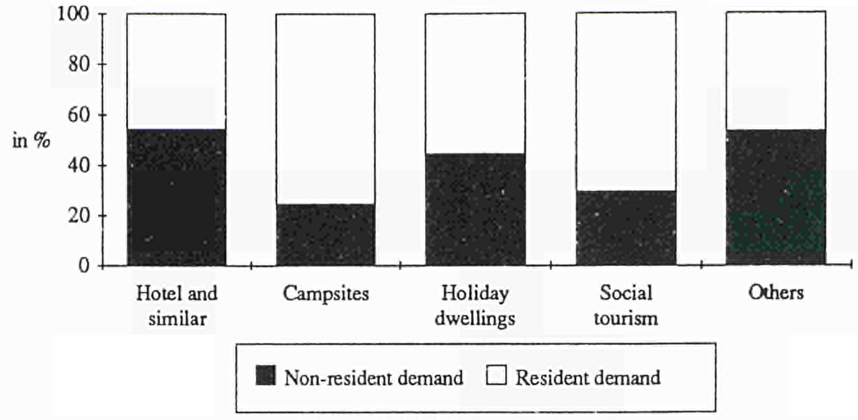
Germany ranked highest among the countries of residence of inbound tourists in 1991. It was followed by The Netherlands, the United Kingdom, and France. The proportion of nights spent by German tourists has remained stable since 1980 at around 45% of total nonresident demand. The most important non-European country was the United States, with 1.8 million nights spent in 1991.

Switzerland has a higher occupancy rate during the summer season (June-September) than in winter (December-April) for hotels and similar establishments. During the 1980s, occupancy rates increased for both seasons.

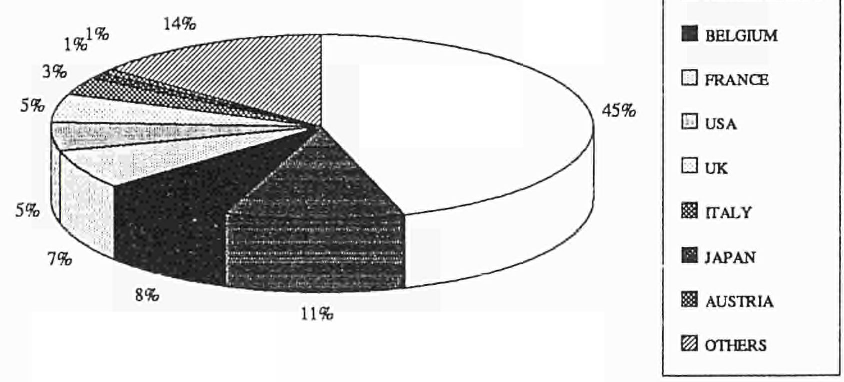
The total number of Swiss residents going abroad to spend their holidays has steadily increased since 1989. The net departure rate remained unchanged at 76% despite a population increase from 6.4 million in 1980 to 6.5 million in 1985. Swiss tourists normally prefer to travel by car (63% in 1984) and 34% stay in hotels and similar establishments.

During the 1980s, expenditure within the country by resident tourists increased by 58%, compared with 92% for nonresidents. Growth in expenditure by Swiss tourists (107%) was higher than that of tourism receipts in Switzerland.

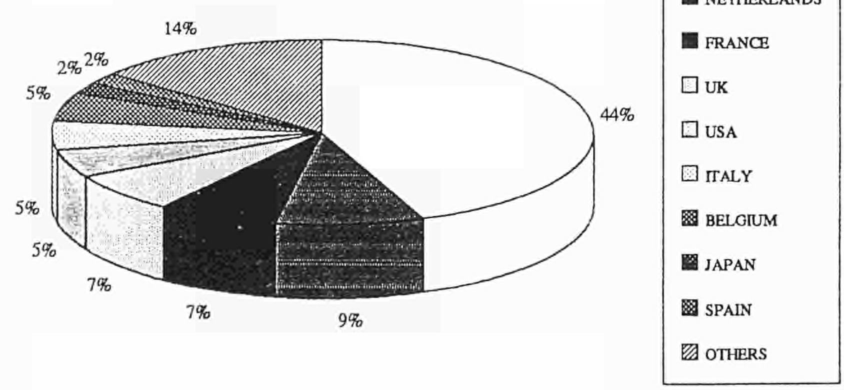
Resident and non-resident demand by type of accommodation, 1991



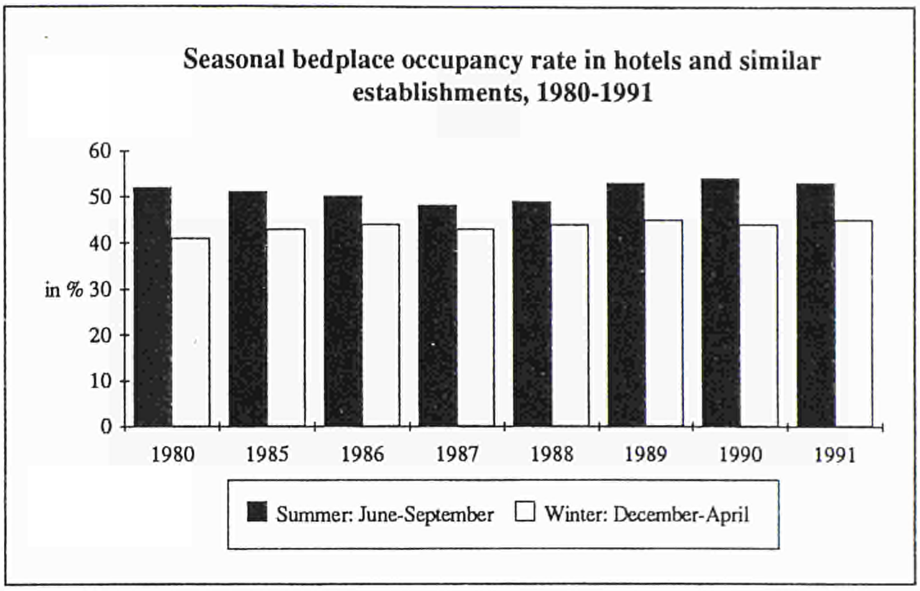
Nights spent by non-residents by country of residence, 1980

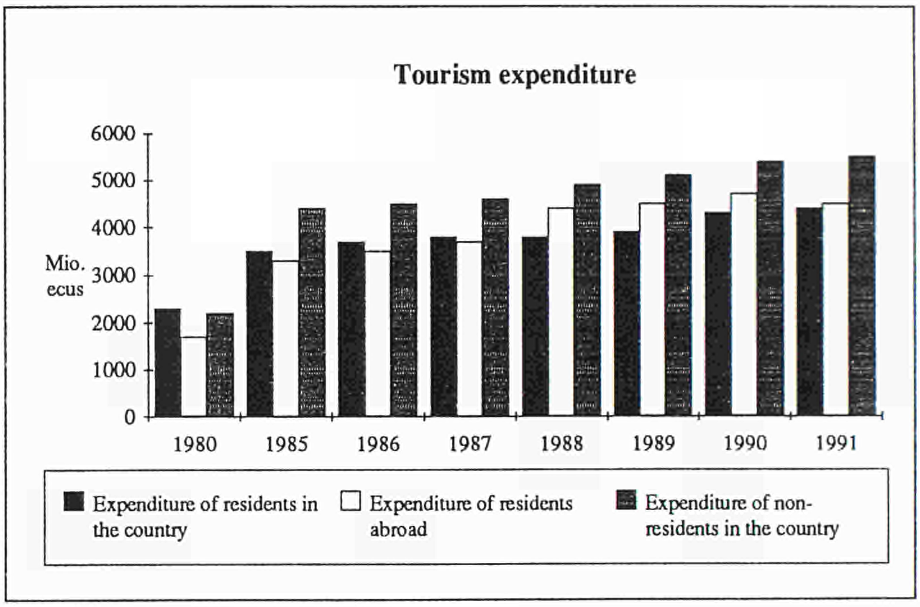


Nights spent by non-residents by country of residence, 1991



eurostat


Seasonal bedplace occupancy rate in hotels and similar establishments, 1980-1991
60
50
40
in % 30
20
10
0
1980
1985
1986
1987
1988
1989
1990
1991
Summer: June-September
Winter: December-April


Tourism expenditure
6000
5000
4000
Mio. ecus 3000
2000
1000
0
1980
1985
1986
1987
1988
1989
1990
1991
Expenditure of residents in the country
Expenditure of residents abroad
Expenditure of non-residents in the country

ES Clasificación de las publicaciones de Eurostat

TEMA

- 0 Diversos (rosa)
- 1 Estadísticas generales (azul oscuro)
- 2 Economía y finanzas (violeta)
- 3 Población y condiciones sociales (amarillo)
- 4 Energía e industria (azul claro)
- 5 Agricultura, silvicultura y pesca (verde)
- 6 Comercio exterior (rojo)
- 7 Comercio, servicios y transportes (naranja)
- 8 Medio ambiente (turquesa)
- 9 Investigación y desarrollo (marrón)

SERIE

- A Anuarios y estadísticas anuales
- B Estadísticas coyunturales
- C Cuentas y encuestas
- D Estudios e investigación
- E Métodos
- F Estadísticas breves

GR Ταξινόμηση των δημοσιεύσεων της Eurostat

ΘΕΜΑ

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- 4 Ενέργεια και βιομηχανία (μπλε)
- 5 Γεωργία, δάση και αλιεία (πράσινο)
- 6 Εξωτερικό εμπόριο (κόκκινο)
- 7 Εμπόριο, υπηρεσίες και μεταφορές (πορτοκαλί)
- 8 Περιβάλλον (τουρκουάζ)
- 9 Έρευνα και ανάπτυξη (καφέ)

ΣΕΙΡΑ

- A Επετηρίδες και ετήσιες στατιστικές
- B Συγκυριακές στατιστικές
- C Λογαριασμοί και έρευνες
- D Μελέτες και έρευνα
- E Μέθοδοι
- F Στατιστικές εν συντομία

IT Classificazione delle pubblicazioni dell'Eurostat

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- 4 Energia e industria (azzurro)
- 5 Agricoltura, foreste e pesca (verde)
- 6 Commercio estero (rosso)
- 7 Commercio, servizi e trasporti (arancione)
- 8 Ambiente (turchese)
- 9 Ricerca e sviluppo (marrone)

SERIE

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- B Statistiche sulla congiuntura
- C Conti e indagini
- D Studi e ricerche
- E Metodi
- F Statistiche in breve

FI Eurostatin julkaisuluokitus

AIHE

- 0 Sekalaista (vaaleanpunainen)
- 1 Yleiset tilastot (yönsininen)
- 2 Talous ja rahoitus (violetti)
- 3 Väestö- ja sosiaalitilastot (keltainen)
- 4 Energia ja teollisuus (sininen)
- 5 Maa- ja metsätalous, kalastus (vihreä)
- 6 Ulkomaankauppa (punainen)
- 7 Kauppa, palvelut ja liikenne (oranssi)
- 8 Ympäristö (turkoosi)
- 9 Tutkimus ja kehitys (ruskea)

SARJA

- A Vuosikirjat ja vuositilastot
- B Suhdannetilastot
- C Laskennat ja kyselytutkimukset
- D Tutkimukset
- E Menetelmät
- F Tilastokatsaukset

DA Klassifikation af Eurostats publikationer

EMNE

- 0 Diverse (rosa)
- 1 Almene statistikker (mørkeblå)
- 2 Økonomi og finanser (violet)
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- 4 Energi og industri (blå)
- 5 Landbrug, skovbrug og fiskeri (grøn)
- 6 Udenrigshandel (rød)
- 7 Handel, tjenesteydelser og transport (orange)
- 8 Miljø (turkis)
- 9 Forskning og udvikling (brun)

SERIE

- A Årbøger og årlige statistikker
- B Konjunkturstatistikker
- C Tællinger og rundspørger
- D Undersøgelser og forskning
- E Metoder
- F Statistikoversigter

EN Classification of Eurostat publications

THEME

- 0 Miscellaneous (pink)
- 1 General statistics (midnight blue)
- 2 Economy and finance (violet)
- 3 Population and social conditions (yellow)
- 4 Energy and industry (blue)
- 5 Agriculture, forestry and fisheries (green)
- 6 External trade (red)
- 7 Distributive trades, services and transport (orange)
- 8 Environment (turquoise)
- 9 Research and development (brown)

SERIES

- A Yearbooks and yearly statistics
- B Short-term statistics
- C Accounts and surveys
- D Studies and research
- E Methods
- F Statistics in focus

NL Classificatie van de publikaties van Eurostat

ONDERWERP

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- 1 Algemene statistiek (donkerblauw)
- 2 Economie en financiën (paars)
- 3 Bevolking en sociale voorwaarden (geel)
- 4 Energie en industrie (blauw)
- 5 Landbouw, bosbouw en visserij (groen)
- 6 Buitenlandse handel (rood)
- 7 Handel, diensten en vervoer (oranje)
- 8 Milieu (turkoois)
- 9 Onderzoek en ontwikkeling (bruin)

SERIE

- A Jaarboeken en jaarstatistieken
- B Conjunctuurstatistieken
- C Rekeningen en enquêtes
- D Studies en onderzoeken
- E Methoden
- F Statistieken in het kort

SV Klassifikation av Eurostats publikationer

ÄMNE

- 0 Diverse (rosa)
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- 2 Ekonomi och finans (lila)
- 3 Befolkning och sociala förhållanden (gul)
- 4 Energi och industri (blå)
- 5 Jordbruk, skogsbruk och fiske (grön)
- 6 Utrikeshandel (röd)
- 7 Handel, tjänster och transport (orange)
- 8 Miljö (turkos)
- 9 Forskning och utveckling (brun)

SERIE

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- B Konjunkturstatistik
- C Redogörelser och enkäter
- D Undersökningar och forskning
- E Metoder
- F Statistiköversikter

DE Gliederung der Veröffentlichungen von Eurostat

THEMENKREIS

- 0 Verschiedenes (rosa)
- 1 Allgemeine Statistik (dunkelblau)
- 2 Wirtschaft und Finanzen (violett)
- 3 Bevölkerung und soziale Bedingungen (gelb)
- 4 Energie und Industrie (blau)
- 5 Land- und Forstwirtschaft, Fischerei (grün)
- 6 Außenhandel (rot)
- 7 Handel, Dienstleistungen und Verkehr (orange)
- 8 Umwelt (türkis)
- 9 Forschung und Entwicklung (braun)

REIHE

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- B Konjunkturstatistiken
- C Konten und Erhebungen
- D Studien und Forschungsergebnisse
- E Methoden
- F Statistik kurzgefaßt

FR Classification des publications d'Eurostat

THÈME

- 0 Divers (rose)
- 1 Statistiques générales (bleu nuit)
- 2 Économie et finances (violet)
- 3 Population et conditions sociales (jaune)
- 4 Énergie et industrie (bleu)
- 5 Agriculture, sylviculture et pêche (vert)
- 6 Commerce extérieur (rouge)
- 7 Commerce, services et transports (orange)
- 8 Environnement (turquoise)
- 9 Recherche et développement (brun)

SÉRIE

- A Annuaires et statistiques annuelles
- B Statistiques conjoncturelles
- C Comptes et enquêtes
- D Études et recherche
- E Méthodes
- F Statistiques en bref

PT Classificação das publicações do Eurostat

TEMA

- 0 Diversos (rosa)
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- 3 População e condições sociais (amarelo)
- 4 Energia e indústria (azul)
- 5 Agricultura, silvicultura e pesca (verde)
- 6 Comércio externo (vermelho)
- 7 Comércio, serviços e transportes (laranja)
- 8 Ambiente (turquesa)
- 9 Investigação e desenvolvimento (castanho)

SÉRIE

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