Netherlands Scientific Council for Government Policy

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Trends in Tourism and Recreation in the European Community

Outline Report

NRIT

Nederlands Research Instituut voor Recreatie en Toerisme, Breda

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PREFACE

This report describes possible trends and developments in tourism and recreation at the level of the European Community. This information was needed by the *Netherlands Scientific Council for Government Policy*. In one of his projects the Council investigates the long-term developments in the rural areas of the European Community. The project will result in a report to the Dutch Government that elucidates the conceivable land-use developments in the EC and the policy options to attain these developments. Special attention will be given to the significance for The Netherlands.

In the project the Council tries to give a quantitative analysis of possible developments within the EC. To that end an insight in possible developments in tourism and recreation is needed. This sector might become very important in some regions of the EC.

The NRIT was willing to accept the challenge to collect the necessary data. It turned out to be a difficult task. With this report the data will be available to a broader public, so next efforts in this direction will have some information to start with.

Prof.dr.ir. R. Rabbinge

1. INTRODUCTION

1.1 Background to the study

The project on rural areas in Europe undertaken by the Scientific Council for Government Policy seeks to chart possible long-term developments in the European Community's rural areas. Its point of departure is the ongoing rise in productivity in agriculture, the most extensive form of rural land use. Advancing knowledge and techniques, coupled with the fact that the input of production factors per unit of output generally declines with increased output per animal or per hectare, means that agricultural productivity is likely to continue rising in the future. Even in the EC's agriculturally most productive regions yields are below the maximum attainable by a margin of a quarter or more.

Maximum feasible agricultural outputs have therefore been calculated for the various regions of Europe on the basis of such strictly technical constraints as soil types, climate and crop characteristics. Production takes place in various different systems (cereal, arable, extensive livestock etc.), and in most cases no attempt is made to achieve goals other than those concerned with production. However, possible developments in rural areas depend in large part on the extent to which various non-agricultural objectives are realized, among them those concerned with social and economic matters, land use and environmental protection.

A quantitative model, developed by the Scientific Council under the name GOAL (General Optimal Allocation of Land use), has been used to determine what spatial patterns of land use emerge if certain weights are attached to the various objectives. While the model was under development it was found that not all the desired objectives could be expressed in quantitative terms, and it was therefore decided to chart the desiderata in relation to the forms of land use concerned with recreation. The comparison of the results obtained using the model with regionalized desiderata in the form of maps can produce valuable information enabling the model results to be adjusted or qualified.

This report summarizes a study of the scale and development of tourist areas within the European Community.

1.2 Research objectives

The research proposal included the following questions:

a. What are Europe's areas of touristic and recreational importance?
b. What areas have potential for further touristic development?
c. How can the economic effects of tourism and recreation in the areas with potential for further development be calculated?

The information available and financial constraints mean that the third question in particular could be addressed only marginally. In connection with the first question this report includes a separate map showing the geographical spread of tourist activity within the EC as reflected in the numbers of sleeper nights spent at the various locations. Appendix 5 includes an account of the NUTS 1 areas used in connection with the recording of sleeper nights. Appendix 6 provides an overview of the geographical divisions used by the EC on the basis of administrative boundaries (NUTS 1 regions).

A detailed map of local strengths and potential within the countries of the EC can only be compiled on the basis of more precise research. We do however provide a view of trends in tourism in the different countries, distinguishing between incoming, domestic and outgoing tourism.

1.3 Procedure

The data for each country were grouped into six categories.

CATEGORY 1

Touristic and recreational resources

An area's touristic appeal is determined primarily by its physical (scenic) qualities, climate and cultural and historical features, which together constitute its touristic and recreational resources. Our survey focuses on major features within each country, distinguishing:

- coastal areas, with a description of their type (sand or shingle beaches, rocks) and the touristic value of the immediate hinterland;
- cities or conurbations of touristic importance on account of their cultural and historical interest or shopping facilities;
- mountainous areas suited to winter sports and/or active forms of recreation in the summer;
- areas with wide scope for the practice of various forms of water sport, including both large lakes and interconnected groups of smaller stretches of water;
- rural areas of woodland and heath and/or small lakes and rivers, perhaps with features of cultural and historic interest spread over smaller towns, villages and the countryside;

- "honeypot attractions" geared to receiving massive flows of visitors (defined for our purposes as at least half a million people a year).

CATEGORY 2

Commercial facilities

Popular holiday areas generally possess high concentrations of businesses offering services to tourists, including accommodation (in the form of hotels, campsites, holiday villages, apartments etc.) and numerous restaurants, bars, shops and amusements of different kinds. Our survey is limited to accommodation, distinguishing between on the one hand hotels, motels etc. which provide meals and on the other the various forms of self-catering accommodation (campsites, holiday apartments etc.). It is reasonable to assume that the volume of tourist accommodation within a given area is also an indicator of the other commercial facilities available. Trends in accommodation capacity are shown over a number of years.

CATEGORY 3

Visitor numbers

Our indicator of visitor numbers is the numbers of sleeper nights spent in tourist accommodation, where possible using data for several years. As a rule the statistics are calculated at national level; in a number of cases the data are not sufficiently detailed to permit a breakdown into holiday areas within a given country. We distinguish between incoming, domestic and outgoing tourism, compiling time series for each type. Separate figures are given for the two categories of accommodation (hotel and self-catering) where they were available.

Since it is in the area of visitor numbers that the most detailed statistics are available these provided the basis for the compilation of a map for the EC area as a whole. The report includes matrices showing the places of origin and destinations of cross-border tourist flows.

CATEGORY 4

The economic impact of tourism

As a rule this is indicated at national level, regional data being available for virtually no country. Where possible employment (generally expressed in terms of the number of persons employed) is indicated; little or nothing is said regarding the manner in which it is determined. Another indicator of the economic impact of tourism is expenditure by foreign visitors in a particular country. This balance-of-payments statistic is available for all EC countries.

CATEGORY 5

Access to holiday areas

History shows that the rise of mass tourism is due in part to the improvement of the passenger-transport infrastructure: the current scale of tourist flows within Europe would not have been possible without an extensive network of motorways, used annually by millions of holiday travellers, and it is clear that further infrastructural improvements have major implications for shifts in the pattern of tourist flows.

Many areas have also been opened up to tourism by the activities of tour operators, airlines (notably those offering charter flights) and coach operators. Air transport in particular has expanded enormously, to the benefit notably of the Mediterranean countries.

CATEGORY 6

Outlook

For each country estimates have been made of future levels of incoming, domestic and outgoing tourism. The first step was to determine past trends in supply and demand over a number of years, giving an idea of the direction of the trends and of average annual growth rates. It is of course arbitrary simply to extrapolate from time series, even where we can be sure of the quality of the data involved, while the recent slump in incoming tourism in Spain and Italy shows how quickly long-standing trends can be reversed. The time series are therefore only one of the components of our look ahead.

Factors tending to increase tourist flows include economic growth, population growth, improvements in the passenger-transport infrastructure, wider car ownership and increased leisure (which may take the form of longer or of more frequent holidays). In the recent past such factors have produced tourist migrations on the grand scale to large numbers of holiday areas, and their ongoing impact must be taken into account in estimating future developments.

The economic significance of tourism to the major receiving areas has been endorsed by industry and government. The tourist industry has continued adjusting the services it provides in line with customers' wishes, while governments in virtually all EC countries have adopted more systematic policies to promote tourism. At the same time efforts are being made to limit the adverse effects of excessive development and tourist numbers.

Expansion on the supply side of the tourist industry has led to increased competition between holiday areas. At the same time holidaymakers' experience has grown, and with it their critical awareness of the facilities offered.

These are the main factors taken into account in compiling our picture of future developments in the various countries.

1.4 Available data

The data assembled for each country give a broad picture of developments in outbound and domestic tourism, omitting much detail which might have been generated by a more extensive study. The broad-brush approach was chosen quite deliberately, however, offering as it does greater scope for developing an overall view of the existing pattern of major tourist destinations within the EC and its future development than can an overdose of facts. A detailed study focusing on a particular theme throughout the EC or on a particular country could well be underpinned by the present study.

In collecting statistical data we were struck by the very limited scope which exists for inter-country comparisons, the result of differences in both definitions and the recording methods used. This applies particularly to statistics on commercial facilities and the economic impact of tourism. Indeed, so limited is the statistical material available on the holiday industry that it can make little contribution to improving the basis for decision-making at European level.

It should be noted, finally, that we have limited ourselves to visits including at least one night, omitting any discussion of day trips. In many cases staying visitors and day visitors use the same facilities, however, favouring expansion and generating enormous tourist flows; a number of major coastal centres, among others, have developed in this way.

1.5 Reproduction

Chapter 2 briefly reviews each country's touristic and recreational resources, drawing conclusions on the basis of the available time series regarding trends in incoming, domestic and outgoing tourism. In the light of these trends and of five factors which are susceptible to influence statements are made regarding the direction in which tourist flows are likely to develop in the longer term.

Chapter 3 divides the EC into three zones, namely a northern zone, an intermediate zone (comprising just one country, France) and a southern zone comprising Portugal and the countries of the Mediterranean. A broad estimate of the scale of domestic and outbound tourism within the territory of the EC is given, based on numbers of sleeper nights; the picture is completed by data on flows into and out of the EC as a whole (see appendix 1).

Future trends in tourism are the subject of the second part of chapter 3, which looks at tourist flows within and between each of the three zones into which the EC is divided for the purposes of this study. We then look at domestic tourism within each zone. Finally we consider the flows into and out of the EC as a whole, covering both intercontinental travel and flows between the EC and other European countries.

2. COUNTRY DATA

This chapter sets out the main tourist statistics for each EC country, starting in each case with a brief outline of its touristic and recreational resources. This is followed by a set of key figures relating to both demand and supply in the tourist industry, distinguishing between the "current" scale of tourism and past trends. Finally, possible future trends are described, taking account of demand- and supply-side factors. The direction of these factors' impact on future developments in the various EC countries is shown in a matrix in appendix 4.

2.1 Ireland

2.1.1 Touristic resources

Ireland's gently rolling countryside has little woodland and much pastureland; the Atlantic coast comprises sandy beaches and rocky bays. Inland there are many lakes and small rivers, many of them with appeal for anglers, watersport enthusiasts and those who enjoy river cruises. The capital, Dublin, is the only city of noteworthy cultural and historic interest. Ireland has a temperate maritime climate with considerable rainfall throughout the year.

2.1.2 Key figures

Volume[1)]

- Volume of demand: 34 million sleeper nights
- Share of domestic tourism (in sleeper nights): 40%; incoming tourism: 60%
- Outbound tourism:
  . Number of holidays/population = 40%[2)]
  . Spending by Irish tourists abroad: US$ 430 million
- Spending by visitors to Ireland: US$ 0.8 billion
- Supply: registered sleeping accommodation for 80,000
- Most popular areas: south and west coasts, Dublin, rivers

[1)] Latest available annual data

[2)] A holiday is defined as a period of time, including at least one night, spent away from home for recreational purposes. This definition is not used in all EC countries.

Past trends

(The percentages indicate average annual growth in the period concerned.)

- Incoming tourism:

. Sleeper nights:	2-3%	(1973-80)
	2-3%	(1981-89)
. Spending:	25%	(1971-79)
	10%	(1981-87)

- Domestic tourism: 1981-89, constant number of sleeper nights
- Outbound tourism:

. Sleeper nights:	9%	(1986-88)

. The number of foreign holidays is also increasing

- Supply:

. Hotels etc.	5%	(1988-89)
. Self-catering	10%	(1988-89)

2.1.3 Outlook

Recent trends in both supply and demand indicate growth notably in incoming tourism, but with supply growing faster than demand. Future trends in tourism depend on a number of variables affecting supply and demand.

a. **Government tourism policy**

In recent years the Irish government has pursued a systematic policy for tourism, with a central emphasis on improving the quality of the tourist product and creating leisure facilities for Irish people. The main measures benefiting tourism are:

- the development and improvement of services for tourists, notably those whose international appeal is growing (e.g. campsites, caravan parks and holiday homes)
- a market-oriented approach to holiday promotion
- improvements in transport and accessibility
- the introduction of environmental-protection measures (a national priority).

b. **Environment**

Ireland's principal tourist resource is its natural environment, and the pollution of that environment would quickly damage the tourist industry. In the light of current government policies for the environment such damage is unlikely in the coming years.

c. **Tourist infrastructure**

Air travel is tending to grow but as yet there has been no airport expansion. The lack of motorways means that the accessibility of Ireland's tourist areas is sometimes poor; improvements are needed in this area. Given the nature of tourism in Ireland no large-scale developments are likely in tourist facilities.

d. Economic factors

Economic growth (GNP) exceeds the EC average; in the 1980's inflation averaged around 13% per year, with a sharp fall in recent years. Unemployment is persistently high (17% in 1989) and is falling only slowly.

e. Population

Ireland's population in 1990 was 3.6 million; it is forecast to decline, and this may impede the growth of domestic tourism.

Conclusion

These various factors point to the conclusion that:

- domestic and outbound tourism are likely to grow
- tourist policy will have the effect of stimulating incoming tourism.

2.2 Britain

2.2.1 Touristic resources

In terms of scenery Britain has much to offer. The southern coastal areas are particularly important to tourism, and away from the coasts there are a number of areas rich in rivers and lakes and areas of natural beauty (national parks). The London conurbation draws many visitors thanks to its cultural and historical attractions and shopping and entertainment facilities. The country has many large-scale tourist attractions, many of them under cover.

The main tourist-industry concentrations are in the south (East Anglia, the South East and the South West). The maritime climate, with rainfall throughout the year, discourages many people from visiting Britain.

2.2.2 Key figures

Volume[1)]

- Volume of demand: 420 million sleeper nights
- Share of domestic tourism (in sleeper nights): 65%; incoming tourism: 25%
- Outbound tourism:

. Number of holidays/population = 50%

. Spending by British tourists abroad: US$ 15 billion

- Spending by visitors to Britain: US$ 11 billion
- Supply: registered sleeping accommodation for 1.6 million
- Most popular areas: coast areas, London, rivers/lakes (Scotland)

[1)] Latest available annual data

Past trends

(The percentages indicate average annual growth in the period concerned.)

- Incoming tourism:

. Sleeper nights:	5%	(1972-80)
	4%	(1981-88)
. Spending:	50%	(1970-80)
	11%	(1981-88)

- Domestic tourism: slight decline (1980-88)
- Outbound tourism:

. Sleeper nights:	4%	(1986-88)
. Holidays:	8%	(1980-88)

- Supply: Hotels etc. 3% (1980-88)

2.2.3 Outlook

In the past few years the supply side of the tourist industry has grown more rapidly than the demand side (both domestic and foreign tourists). Variables affecting future trends in tourism are as follows.

a. **Government tourism policy**

The main focuses of official policy are:

- the exploitation of the scope for attracting more tourists offered by the Channel tunnel
- the development, in conjunction with the industry, of an ambitious programme for improving the quality and range of vocational-training courses related to tourism
- supporting the Tourist Boards in their work of promoting both domestic and incoming tourism
- extending the holiday season, building on the good results already achieved.

b. Environment

Environmental problems do not appear to have had any adverse impact on the growth of tourism, but the pressure on the national parks requires careful monitoring.

c. Tourist infrastructure

Access to holiday areas will be greatly improved by the opening of the Channel tunnel: not only will tourists travelling by car be able to reach Britain much more quickly from 1993 onwards, road and rail links to other parts of the country are also due to be improved. The emphasis in the development of tourist attractions will be on all-weather facilities.

d. Economic factors

Economic growth in the 1980s was well above the EC average (with an average annual increase in GNP of 3.6%); inflation ran at 6% per year. Unemployment is falling and, at 6.5% in 1989, was below the EC average of 9.0%.

e. Population

Britain's population stands at 57.3 million (1990) and is rising; this will have a positive impact on domestic tourism. The average age of the population is rising rapidly, a factor of which account must be taken in the development of tourist facilities.

Conclusion

These various factors point to the conclusion that domestic and incoming tourism in Britain will continue to grow; outbound tourism is also likely to increase.

2.3 Netherlands

2.3.1 Touristic resources

The Netherlands is a flat country, rich in lakes, rivers and canals, with a relatively wide variety of tourist areas. The coasts of Zeeland, South and North Holland and the Frisian Islands are suited to seaside holiday-making. There are numerous areas, widely spread across the country, suited to sailing, fishing etc. (the lakeland areas of Friesland, South Holland and Utrecht, the IJsselmeer, the Delta region and the North Sea). There are relatively small areas of woodland and heath mainly in the east and south of the country. The landscape of South Limburg is hilly. Cities such as Amsterdam, Gouda, Delft and Maastricht have much to offer of cultural and historic interest, as do such picturesque old villages as Marken, Volendam and Giethoorn.

The Netherlands has a temperate maritime climate with wet summers and mild winters.

2.3.2 Key figures

Volume[1)]

- Volume of demand: 80 million sleeper nights
- Share of domestic tourism (in sleeper nights): 85%; incoming tourism: 15%
- Outbound tourism:
  . Number of holidays/population = 65%
  . Spending by Dutch tourists abroad: US$ 4.8 billion
- Spending by visitors to the Netherlands: US$ 2.2 billion
- Supply: registered sleeping accommodation for 350,000
- Most popular areas: coastal areas, Amsterdam, rivers/lakes (IJsselmeer, Friesland lakes, Zeeland), Frisian Islands, Veluwe

1) Latest available annual data

Past trends

(The percentages indicate average annual growth in the period concerned.)

•	Incoming tourism:		
	. Sleeper nights:	2.5%	(1974-80)
		2%	(1981-88)
	. Spending:	10%	(1974-80)
		6%	(1982-89)
•	Domestic tourism:	-1%	(1980-88)
•	Outbound tourism:		
	. Sleeper nights:	1.3%	(1986-88)
	. Holidays:	3%	(1980-89)
•	Supply:		
	. Hotels etc.	1%	(1980-88)
	. Self-catering	2.5%	(1982-88)

2.3.3 Outlook

The supply side of the industry (i.e. tourist accommodation) expanded by an average of 1.5% per year between 1984 and 1989; demand (i.e. sleeper nights) has increased even more rapidly in recent years. The trend is thus positive.

a. **Government tourism policy**

The Dutch government's tourism policy is geared to promoting both domestic and incoming tourism. Its main focuses are as follows:

- the further professionalization of the leisure and tourism industry
- the improvement of the leisure and tourism infrastructure through cooperation between government, industry and consumer organizations
- greater emphasis on environmental matters, reducing the impact of tourism on areas of scenic or ecological importance while at the same time promoting tourists' interest in nature where possible (educational function)
- stepping up promotional and informational activities at home and abroad
- the promotion of international cooperation and the compilation of a research programme
- further measures to extend the holiday season.

Important themes in the fleshing-out of policy include "The Netherlands as Waterland", urban nodes, the cultural and historical heritage and the coast.

b. **Environment**

Nothing is known regarding any adverse effects of environmental pollution through tourist developments in the Netherlands, though there is pollution by industry (partly imported from other countries) and agriculture. Intensive action is being taken to tackle the problem of pollution resulting from the dumping of chemical wastes.

c. **Tourist infrastructure**

The highly developed road network provides easy access to tourist areas. Overall there are sufficient facilities for tourists, and in the future the main stress must be on the development of a tourist infrastructure with the full involvement of the private sector and taking account of the themes listed under a. above. New projects must meet environmental requirements and contribute to sustainable economic growth.

d. **Economic factors**

With an annual increase in GNP of 2.1%, economic growth between 1982 and 1987 roughly equalled the EC average. Average inflation in the 1980s was very low (at around 2% per year). Unemployment has fallen slightly and is below the EC average.

e. **Population**

The population is forecast to rise from 14.9 in 1990 to 16.1 in 2010, with favourable implications for domestic and outbound tourism.

Conclusion

Thanks partly to the continuing growth in international business travel incoming tourism will continue to grow. Much will also depend on the extent to which the Netherlands' coastal areas can continue to attract German visitors. At the intercontinental level incoming visitor flows are likely to stabilize.

Domestic tourism, facing as it does growing competition from alternative foreign destinations, is forecast to stabilize at its present level or even to decline modestly.

If the trend of recent years persists, outbound tourism will continue to grow; however, there are indications that the current economic situation - or at least the way it is perceived by Dutch people - will act as a brake on that growth.

2.4 Belgium

2.4.1 Touristic resources

Belgium's main holiday areas are the coast, cities of cultural and historic importance and the Ardennes; with the exception of the Kempen area the rest of the country has little touristic appeal.

The country's climate is mainly maritime, but with alpine tendencies in the Ardennes.

2.4.2 Key figures

Volume[1)]

- Volume of demand: 34 million sleeper nights
- Share of domestic tourism (in sleeper nights): 70%; incoming tourism: 30%
- Outbound tourism:

. Number of holidays/population = 55%

. Spending by Belgian tourists abroad: US$ 2 billion

- Spending by visitors to Belgium: US$ 1.7 billion
- Supply: registered sleeping accommodation for 500,000
- Most popular areas: coastal areas, Ardennes, historic cities

[1] Latest available annual data

Past trends

(The percentages indicate average annual growth in the period concerned.)

• Incoming tourism:		
. Sleeper nights:	slight decline (<1%)	(1974-80)
	7%	(1981-88)
. Spending:	stable	(1981-85)
• Domestic tourism:	-2%	(1970-80)
	2%	(1981-87)
• Outbound tourism:		
. Sleeper nights:	2%	(1986-88)
. Holidays:	- -	
• Supply:		
. Hotels etc.	2%	(1984-88)
. Self-catering	0%	(1984-88)

2.4.3 Outlook

Recent trends show demand rising faster than supply, the rise in demand mainly reflecting growth in incoming tourism.

a. **Government tourism policy**

The main focuses of government policy on tourism are:

- the modernization and development of tourist accommodation and the raising of standards of service
- the implementation of market research and the preparation of action plans
- the promotion of cooperation between government and industry (financial support, simplified investment schemes)
- the development of university-level courses in travel and tourism.

b. **Environment**

No specific policies on tourism and the environment have been adopted in Belgium. Thus far there are no indications that environmental problems are impeding the growth of tourism. While the coastal areas are sometimes overcrowded in the summer this has not led to any reduction in the number of tourists.

c. **Tourist infrastructure**

Belgium's road system generally meets the requirements of tourism. In the area of tourist facilities the emphasis is on modernizing existing accommodation in the form of hotels and holiday villages.

d. **Economic factors**

In the 1980's economic growth in Belgium lagged behind the EC average (with an annual average increase in GNP at market prices of 2.2%, as against the EC average of 2.8%). Inflation ran at 5% per year. Unemployment has fallen somewhat, but at 10% was still above the EC average of 9.0% in 1989.

e. **Population**

Belgium's population in 1990 was 9.7 million; it is expected to decline in the future, with adverse implications for domestic tourism. The age breakdown of the population coincides with the EC average.

Conclusion

These various factors point to the conclusion that:

- domestic tourism is reaching saturation point
- outbound tourism appears to have increased in recent years (this is based on very limited data)
- incoming tourism is growing slightly in volume terms, but this is not reflected in total tourist spending.

2.5 Luxembourg

2.5.1 Touristic resources

The Grand Duchy has great scenic appeal. For the most part it is a hilly country, with many woods, pastures and cornfields. Its capital, Luxembourg City, and smaller towns such as Diekirch and Vianden have features of cultural and historic interest; there are no large-scale tourist attractions.

Luxembourg has no major rivers or lakes and is of course land-locked.

2.5.2 Key figures

Volume[1)]

- Volume of demand: 2 million sleeper nights
- Share of domestic tourism (in sleeper nights): 10%; incoming tourism: 90%
- Outbound tourism:
  . Number of holidays/population = 65%
  . Spending by Luxembourg tourists abroad: unknown
- Spending by visitors to Luxembourg: unknown
- Supply: unknown
- Most popular areas: north-west (Oesling), east (Mullerthal) and Luxembourg City.

[1)] Latest available annual data

Past trends

(The percentages indicate average annual growth in the period concerned.)

• Incoming tourism:	
. Sleeper nights:	constant
. Spending:	unknown
• Domestic tourism:	declining (1986-87)
• Outbound tourism:	
. Sleeper nights:	14% (1986-88)
. Holidays:	unknown
• Supply:	
. Hotels etc.	unknown
. Self-catering	unknown

2.5.3 Outlook

Few statistics are available on either supply or demand, but the assumption is that there will be no major changes. An increase in incoming tourism is likely to be offset by an increase in outbound tourism.

a. **Government tourism policy**

Government policy for tourism in the 1990s is aimed mainly at developing greater flexibility and diversity in tourist provision, taking account of the trend towards shorter and more frequent holidays combined with the growing demand for more active holidays. Important measures include:

- the creation of all-weather facilities
- the encouragement of industry to develop the tourist infrastructure
- the development of promotional activities.

b. **Environment**

Environmental problems do not so far appear to have had any effect on the development of tourism.

c. **Tourist infrastructure**

The road system provides good access to holiday areas. The emphasis in the development of tourist facilities is on the provision of modern hotels and campsites. The increasing popularity of rural holidays is reflected in the provision of more farmhouse accommodation.

d. **Economic factors**

In the 1980s Luxembourg enjoyed the strongest economic growth of all EC countries, with an average annual increase in GNP of 4.1% against the overall EC figure of 2.8%. Inflation ran at 4% per year. Unemployment, which stood at 1.9% (the lowest rate within the EC) in 1989, is declining.

e. **Population**

Luxembourg's population is likely to stabilize at 0.38 million, leaving the level of domestic tourism largely unchanged.

Conclusion

No significant changes are expected in tourist flows in the near future. The scale of tourism in the EC context is anyway limited.

2.6 West Germany

2.6.1 Touristic resources

The great diversity of its landscapes - with coasts, mountains, forests, rivers and lakes - makes West Germany attractive to tourists. The country also has much of cultural and historical interest, mainly in the larger towns and cities.

The most important Land in terms of tourism is Bavaria. West Germany has a maritime climate in the north and a continental climate in much of the rest of the country, with locally an alpine climate in the south.

2.6.2 Key figures

Volume[1)]

- Volume of demand: 245 million sleeper nights
- Share of domestic tourism (in sleeper nights): 85%; incoming tourism: 15%
- Outbound tourism:
  . Number of holidays/population = 45%
  . Spending by German tourists abroad: US$ 21 billion
- Spending by visitors to Germany: US$ 5 billion
- Supply: registered sleeping accommodation for 1,950,000
- Most popular areas: German Alps, Black Forest, Saarland, Harz and Eifel mountains

[1)] Latest available annual data

Past trends

(The percentages indicate average annual growth in the period concerned.)

• Incoming tourism:			
	. Sleeper nights:	8%	(1974-80)
		7%	(1981-89)
	. Spending:	24%	(1971-79)
		3%	(1981-85)
• Domestic tourism:		3%	(1970-80)
		-0.3%	(1981-89)
• Outbound tourism:		5%	(1980-89)

- Supply:

. Hotels etc.	2%	(1981-89)
. Self-catering (campsites only)	-3%	(1985-89)

2.6.3 Outlook

The supply of tourist provision is stabilizing while demand is increasing (mainly reflecting the growing number of nights spent in Germany by foreign tourists).

a. **Government tourism policy**

The German government's policy for tourism focuses on the industry's medium-term economic significance. Important elements include:

- replacing government activities with private enterprise wherever possible and developing structures for cooperation between government and industry
- supporting the promotional work of the Deutsche Zentrale fuer Tourismus in attracting foreign tourists to Germany
- promoting research into the reasons for the decline in domestic tourism and providing statistics needed by the tourist industry
- developing or renewing the tourist infrastructure, having regard to environmental requirements.

It should be noted that the detailed tourist policy is the responsibility of the individual Laender.

b. **Environment**

Given the strict environmental policies operated by both federal and Land governments, environmental problems are not expected to have an adverse impact on the development of tourism.

c. **Tourist infrastructure**

The accessibility of holiday areas is good, and planned improvements in the road network and increases in the number of air links mean that no problems are expected in the future. In the area of tourist provision the initiative is left wherever possible to private enterprise. Major expansion is not expected, given the limited rate of growth notably of domestic tourism.

d. **Economic factors**

West Germany was among the EC's economically strongest member states. GNP growth in the 1980s averaged 2.5% per year, slightly lower than the EC mean. Inflation and unemployment are well below the EC average and are tending to decline.

e. **Population**

The population of the former West Germany is expected to decline from 61.1 million to 58.6 million in 2010, with adverse implications for domestic tourism.

Conclusion

Domestic tourism would appear to have reached saturation point; indeed, the forecast decline in population could well lead to a fall in the volume of domestic tourism. The country's affluence tends to favour outbound at the expense of domestic tourism.

While incoming tourism has grown in recent years its volume remains limited in relation to potential markets in Europe and beyond; there is thus potential for further growth. A positive role is played here by government policy, which seeks to promote further professionalization within the tourist industry.

2.7 Denmark

2.7.1 Touristic resources

Tourism in Denmark is concentrated in the country's coastal areas (including the islands) and in the capital, Copenhagen. In scenic terms Denmark has relatively little to offer, with no mountains, few forests and much modern farming. Features of cultural or historic interest are dispersed across the country; there are also relatively many "honeypot" attractions.

The main holiday areas are Jutland (particularly the north-west coast), Funen and Copenhagen. Denmark has a temperate maritime climate.

2.7.2 Key figures

Volume[1)]

- Volume of demand: 20 million sleeper nights
- Share of domestic tourism (in sleeper nights): 55%; incoming tourism: 45%
- Outbound tourism:

. Number of holidays/population = 35%

. Spending by Danish tourists abroad: US$ 3 billion

- Spending by visitors to Denmark: US$ 2.4 billion
- Supply: registered sleeping accommodation for 550,000
- Most popular areas: coastal areas of Jutland, Copenhagen and certain other large islands

[1)] Latest available annual data

Past trends

(The percentages indicate average annual growth in the period concerned.)

•	Incoming tourism:		
	. Sleeper nights:	1.5%	(1973-80)
		-1.5%	(1981-88)
	. Spending:	27%	(1971-80)
		13%	(1981-88)
•	Domestic tourism:	2%	(1970-80)
		1.5%	(1981-88)
•	Outbound tourism:		
	. Sleeper nights:	0%	(1986-88)
	. Holidays:	2.5%	(1980-85)
•	Supply:		
	. Hotels etc.	1%	(1981-84)
	. Self-catering:	unknown	

2.7.3 Outlook

Demand has stabilized in recent years, mainly through a fall in the number of nights spent in the country by foreign tourists. No recent data are available on the supply side of the holiday industry, making it difficult to take this variable into account in forecasting future trends. We now look at some of the variables affecting the future development of tourism in Denmark.

a. **Government tourism policy**

The Ministry of Industry has drawn up long-term objectives and action programmes for the future of tourism which emphasize the removal of obstacles to the industry's development. The following measures are being taken:

- the initiation of support programmes geared to domestic tourism and the development of the tourist product
- the development of specialized training courses in the field of tourism
- the improvement of tourism statistics
- market research and campaigns to promote both domestic and incoming tourism
- the extension of the holiday season, e.g. by organizing activities outside the high season

b. **Environment**

Since tourism in Denmark is largely geared to nature and the countryside effective environmental protection is vital. The growing pollution of the North Sea may cause problems for the development of coastal tourism in the future.

c. **Tourist infrastructure**

The road network provides satisfactory access to the main holiday areas; improvements are mainly concerned with bridge links to Sweden. In the field of tourist provision expansion is concentrated in the area of accommodation and attractions suitable for families with children.

d. **Economic factors**

GNP growth in the 1980s, at 2.1% per year, was below the EC average; inflation ran at 9% per year. Unemployment, which stood in 1989 at 7% (well below the EC average of 9%), is tending to fall.

e. **Population**

Denmark's population, currently 5.1 million, is set to fall slightly; the decline will have no significant impact on domestic tourism. The population is aging.

Conclusion

Domestic tourism is expected to show a very modest expansion, with economic growth likely to produce a further increase in outbound tourism. On the incoming side expectations are not high, reflecting the decline experienced in recent years. Moreover greater competition may well come from other Scandinavian countries.

2.8 France

2.8.1 Touristic resources

France is a country of very varied touristic appeal, not least thanks to its great scenic diversity. Major tourist areas include the sandy Atlantic and Mediterranean coasts and mountainous regions attracting visitors in both summer and winter (winter sports). Inland France also possesses forests and many areas rich in rivers and lakes.

Features of cultural and historic interest are concentrated in Paris and the surrounding areas, but many other cities also have much to offer. Recent years have seen the establishment of a number of "honeypot" attractions, a trend which will receive a further boost in 1992 with the opening of Euro-Disneyland near Paris.

France has predominantly a temperate maritime climate, but with an alpine climate in the Alps and Pyrenees and a mediterranean climate in the south.

2.8.2 Key figures

Volume[1)]

- Volume of demand: 292 million sleeper nights
- Share of domestic tourism (in sleeper nights): 67%; incoming tourism: 33%
- Outbound tourism:
  . Number of holidays/population = 19%
  . Spending by French tourists abroad: US$ 10 billion
- Spending by visitors to France: US$ 14 billion
- Supply: registered sleeping accommodation for 1.4 million
- Most popular areas: Atlantic coast, Paris, Mediterranean coast, Alps, Pyrenees

1) Latest available annual data

Past trends

(The percentages indicate average annual growth in the period concerned.)

- Incoming tourism:

. Sleeper nights:	2%	(1976-80)
	6%	(1981-87)

	. Spending:	32%	(1976-80)
		14%	(1981-88)
•	Domestic tourism:	5%	(1971-80)
		2%	(1980-87)
•	Outbound tourism:		
	. Sleeper nights:	7%	(1986-88)
	. Holidays	5%	(1984-88)
•	Supply:		
	. Hotels etc.	2%	(1983-88)
	. Self-catering	2%	(1983-88)

2.8.3 Outlook

In the 1980s both demand and supply grew by an average of 2-3% per year.

a. **Government tourism policy**

The Ministry of Tourism seeks to promote the industry by means of the following measures:

- modernization of the tourist product by, among other things, improving vocational education in the tourism field, bringing together producers and sellers of tourist goods and services and reducing taxes which affect tourism
- supporting firms and institutions which seek to promote the tourist product
- supporting regional developments with a view to encouraging tourist flows into new areas, with an emphasis on mountain areas, spas and coastal regions

b. **Environment**

Environmental problems mainly affect the Mediterranean coast. Another environmental problem with possible implications for tourism is formed by the many forest fires of recent years, devastating great tracts of land. Environmental degradation by tourism is affecting parts of the French Alps.

c. **Tourist infrastructure**

The following access improvements are scheduled for the next few years:

- motorway extensions
- expansion of the high-speed rail (TGV) network
- completion of the Channel Tunnel
- expansion of existing airports and opening of new ones.

The construction and improvement of tourist facilities will mainly be limited to the Alps and the coastal regions. Great emphasis is also to be placed on updating existing accommodation e.g. in spa towns. A very significant event will be the opening of Euro-Disneyland, which is expected to attract between ten and thirteen visitors a year.

d. **Economy**

In the 1980s GNP growth in France lagged slightly behind the EC average. Inflation averaged 8% per year. Unemployment rose, reaching the EC average of 8.7% in 1987.

e. **Population**

France has a population of around 56 million; the figure is set to rise to almost 59 million in 2010. This increase may have positive implications for domestic tourism.

Conclusion

These various factors indicate that:

- incoming tourism will continue growing over the next few years
- domestic tourism will stabilize or grow slightly
- outbound tourism will continue to increase.

2.9 Portugal

2.9.1 Touristic resources

While the Atlantic coastline has much to offer from the tourist viewpoint, inland Portugal is of less interest owing to the lack of lakes and rivers and the limited number of features of cultural and historic interest. Moreover the inland areas which could attract tourists - the country's mountainous and wooded regions - are not easily accessible.

For the most part Portugal has a temperate maritime climate, but with high temperatures and little rainfall in the south.

2.9.2 Key figures

Volume[1)]

- Volume of demand: 30 million sleeper nights
- Share of domestic tourism (in sleeper nights): 30%; incoming tourism: 70%
- Outbound tourism:

. Number of holidays/population = 5%

. Spending by Portuguese tourists abroad: US$ 240 million

- Spending by visitors to Portugal: US$ 2 billion
- Supply: registered sleeping accommodation for 160,000
- Most popular areas: strong concentration in coastal areas (Algarve, Lisbon, Madeira, Oporto)

[1] Latest available annual data

Past trends

(The percentages indicate average annual growth in the period concerned.)

• Incoming tourism:		
. Sleeper nights:	23%	(1974-80)
	7%	(1981-88)
. Spending:	25%	(1971-79)
	18%	(1981-87)
• Domestic tourism:	13%	(1974-80)
	-1%	(1981-87)
• Outbound tourism:		
. Sleeper nights	3.5%	(1986-88)
• Supply:		
. Hotels etc.	3%	(1980-88)
. Self-catering	11%	(1987-88)

2.9.3 Outlook

Trends in supply and demand show tourism to have expanded rapidly particularly in the last few years; whether this expansion will continue depends on a number of factors on both the supply and the demand side.

a. **Government tourism policy**

The Portuguese government's main goals are:

- the development of inland tourism with a view to reducing pressure on the coastal areas
- job creation
- environmental protection and the conservation and restoration of features of cultural and historic interest

- the promotion of youth tourism
- enabling the holiday industry to modernize and innovate the use of new technologies in the development of tourist facilities
- the extension of the holiday season.

b. **Environment**

Environmental problems have developed on the Algarve coast and Madeira as a result in part of mass tourism. The main problem is marine pollution (some of it emerging from the Mediterranean); the sheer scale of holiday development has also had an adverse impact on the environment. The Portuguese government recently issued strict guidelines aimed at minimizing the environmental damage from construction activities. International action is needed to tackle the problem of pollution in the Mediterranean.

c. **Tourist infrastructure**

Completion of the plan to extend the motorway system from Spain to Portugal's west coast will greatly improve access to holiday areas, as will airport expansion schemes. In the area of tourist facilities the government has decided that expansion will be permitted only where the infrastructure is adequate.

d. **Economy**

GNP growth in the 1980s averaged 3% per year, which exceeds the EC average. While inflation is tending to decline, at 15% it is still very high. Unemployment is low (5%) and falling. Incoming tourism benefits from the fact that Portugal is still a low-cost holiday destination.

e. **Population**

Portugal's population, currently 10.5 million, is set to rise sharply. There are relatively many young people, reflecting the tendency of Portuguese families to have many children. The growing population has positive implications for domestic and outbound tourism.

Conclusion

We can expect tourism in Portugal to experience relatively rapid growth over the next few years, continuing the 1980s' upward trend in both supply and demand. Factors with a positive impact on tourism include:

- active policies on the part of government
- improvements in the tourist infrastructure
- a growing economy
- population growth.

The industry's growth may be adversely affected by environmental problems.

2.10 Spain

2.10.1 Touristic resources

Spain's holiday industry has so far remained largely concentrated in the coastal regions, almost the entire Mediterranean coast, along with the Balearics and the Canaries, being suited to tourism; the Atlantic coast, in the north, with its high rainfall, has less international tourist appeal. Spain also has much to offer in scenic terms, however, with mountainous regions (e.g. the Pyrenees) and forests; there are also features of historic and cultural interest. The country has few rivers and lakes of recreational significance and the accessibility of inland areas is a considerable problem.

Several types of climate are to be found in Spain, with the warm mediterranean climate of the south and east of particular importance in connection with "sun, sea and sand" tourism.

2.10.2 Key figures

Volume[1)]

- Volume of demand: 150 million sleeper nights
- Share of domestic tourism (in sleeper nights): 35%; incoming tourism: 65%
- Outbound tourism:
  . Number of holidays/population = 5%
  . Spending by Spanish tourists abroad: US$ 2.5 billion
- Spending by visitors to Spain: US$ 8 billion
- Supply: registered sleeping accommodation for 1,725,000
- Most popular areas: mainly in coastal areas (Costa Brava, Costa Dorada, Costa Blanca, Costa del Sol) and the archipelagos (Canaries, Balearics)

[1)] Latest available annual data

Past trends

(The percentages indicate average annual growth in the period concerned.)

- Incoming tourism:

. Sleeper nights:	0%	(1974-80)
	6%	(1981-87)

	. Spending:	18%	(1973-79)
		5%	(1981-87)
•	Domestic tourism:	11%	(1970-78)
		3%	(1981-87)
•	Outbound tourism:		
	. Sleeper nights	14%	(1986-88)
	. Holidays	Unknown	
•	Supply:		
	. Hotels etc.	1.5%	(1980-89)
	. Self-catering	4.4%	(1983-89)

2.10.3 Outlook

The supply of accommodation grew by an average of 3% per year in the 1980s; demand (defined as the number of nights spent in the country by all tourists) also rose in the period up to 1989 but fell back sharply thereafter.

a. **Government tourism policy**

The main focuses of government policy are:

- the sharp fall in demand
- seasonality
- the regional concentration of tourism (mainly along the coasts)
- environmental pollution.

Efforts are being made to widen Spain's image beyond the limits of "sun, sea and sand" e.g. through the following measures:

- the promotion of inland tourism through an emphasis on features of cultural and historic interest and scenic attractions
- additional tourist provision in the form of sports complexes (notably catering for tennis, golf and swimming), spa facilities and winter sports (Pyrenees, Sierra Nevada)
- improved access to and within inland Spain
- publicity campaigns geared to the country's new image (of note here are the Seville World Fair and the 1992 Olympic Games in Barcelona).

b. **Environment**

The scale of environmental pollution in Spain is such as to produce a direct visible impact on the growth of tourism. Resort development on the coasts has radically altered landscapes, while mass tourism itself is a major cause of pollution on the coasts, in the sea and in national parks. As yet few specific measures have been taken to counter pollution.

c. **Tourist infrastructure**

Access to holiday areas is being improved by extensions to the rail network (links with the French high-speed network are planned), while airport construction and expansion (e.g. at Seville and Malaga) will help promote air travel. In the improvement of particular tourist facilities the emphasis is on diversity.

d. **Economy**

At an average of 3.6% per year the growth rate of Spain's economy was well above the EC average in the 1980s; inflation, while it continues to fall, remains above the EC average. Unemployment is falling but remains very high at 17% of the workforce.

e. **Population**

Spain's population, currently 39.3 million, is expected to rise sharply, with favourable implications for domestic and outbound tourism. There are relatively more young people in Spain than in the EC as a whole.

Conclusion

The recent decline in incoming tourism is expected to continue; its sharpness and duration will depend on a number of factors. Positive factors include economic and demographic growth (domestic tourism), while a negative impact can be expected from environmental problems. Higher prices than in competing Mediterranean countries are another negative factor. Much will depend on government policy, in combination with the development of the tourist infrastructure; while both appear to be positive in their implications it remains to be seen how (and how quickly) tourists will respond.

2.11 Italy

2.11.1 Touristic resources

Italy has much to offer in touristic terms (more than e.g. Spain), with extensive coasts, mountain regions (including winter-sport centres in the north), many features of cultural and historic interest and large lakes (in the north).

Several types of climate are to be found in Italy, with the mediterranean climate favouring coastal tourism and the alpine climate winter sports.

2.11.2 Key figures

Volume[1)]

- Volume of demand: 355 million sleeper nights
- Share of domestic tourism (in sleeper nights): 70%; incoming tourism: 30%
- Outbound tourism:
  . Number of holidays/population = 16%
  . Spending by Italian tourists abroad: US$ 6 billion
- Spending by visitors to Italy: US$ 12 billion
- Supply: registered sleeping accommodation for 4,500,000
- Most popular areas: mainly in the north, with concentrations along the coasts, in historic cities, around inland lakes and in the Alps

1) Latest available annual data

Past trends

(The percentages indicate average annual growth in the period concerned.)

•	Incoming tourism:		
	. Sleeper nights:	8%	(1974-80)
		2.3%	(1981-88)
	. Spending:	42%	(1971-79)
		10%	(1981-88)
•	Domestic tourism:	3%	(1970-80)
		1%	(1981-88)
•	Outbound tourism:		
	. Sleeper nights	12%	(1986-88)
	. Holidays	40%	(1985-89)
•	Supply:		
	. Hotels etc.	1%	(1976-86)
	. Self-catering	2%	(1976-86)

2.11.3 Outlook

The overall picture is one of a significant fall in the number of hotels between 1976 and 1986, but with an increase in the number of beds (in both hotel and self-catering accommodation). The number of sleeper nights increased by an average of 2% per year in the period to 1988; this was followed by stabilization, reflecting both a fall in incoming and a rise in outbound tourism.

a. **Government tourism policy**

The Italian government is seeking to replace quantitative goals in the area of tourist policy with qualitative ones. Much will depend on the development of the high-grade facilities needed to cater for those travelling e.g. for business, cultural or health reasons. Other policy focuses include:

- greater emphasis on the needs of young people and the elderly
- the declining appeal of the coasts, which will need to be offset by improved tourist provision elsewhere
- large-scale publicity campaigns aimed at improving Italy's image abroad

b. **Environment**

As in Spain, environmental problems are having a visible impact on tourism: the pollution of the Mediterranean by manufacturing industry and tourism is a major reason for the decline in coastal tourism, while cities like Rome, Milan and Venice face problems of air pollution and overcrowding in the high season.

c. **Tourist infrastructure**

Improvements to the road system are mainly aimed at improving access to the south of the country. No large-scale construction of new tourist facilities is likely, but there is a trend towards more luxurious hotels offering a wider range of services.

d. **Economy**

Economic growth in the 1980s was slightly higher than the EC average. Inflation is running at 10% per year. Unemployment stood at 11% in 1989 and is showing no clear signs of falling.

e. **Population**

Italy's population, which currently stands at 57.3 million, is expected to show a very modest increase. The age breakdown of the population is close to that of the EC as a whole.

Conclusion

Taking all these various factors into account there is little reason to expect Italy's tourist industry to show rapid growth over the next few years; nor do recent figures give grounds for optimism. Much will depend on the policies pursued in respect notably of environmental problems and the development of new holiday areas.

2.12 Greece

2.12.1 Touristic resources

Greece's main touristic resource is its numerous attractive sandy beaches, on both the mainland and the many islands. In addition the country has much to offer of cultural and historic interest, while the traditional villages with their characteristic Greek atmosphere also attract many foreign visitors.

It is noteworthy that Greece has no large-scale commercial tourist attactions. Seaside tourism benefits greatly from the warm mediterranean climate enjoyed by almost the entire country.

2.12.2 Key figures

Volume[1)]

- Volume of demand: 50 million sleeper nights
- Share of domestic tourism (in sleeper nights): 20%; incoming tourism: 80%
- Outbound tourism:
  . Number of holidays/population = 15%
  . Spending by Greek tourists abroad: US$ 500 million
- Spending by visitors to Greece: US$ 2.5-3 billion
- Supply: registered sleeping accommodation for 600,000
- Most popular areas: islands (80-90% foreign visitors), mainland coasts and Athens (50% foreign visitors)

[1)] Latest available annual data

Past trends

(The percentages indicate average annual growth in the period concerned.)

•	Incoming tourism:		
	. Sleeper nights:	20%	(1970-80)
		3%	(1981-89)
	. Spending:	80%	(1970-80)
		7%	(1981-88)
•	Domestic tourism:	slight growth	(1970-80)
•	Outbound tourism:	constant	(1981-89)
	. Sleeper nights	12%	(1986-88)
•	Supply:		
	. Hotels etc.	5-6%	(1980-88)
	. Self-catering	5-6%	(1980-87)

Outlook

Supply and demand data from the recent past show growth notably in incoming tourism. Whether this trend persists will depend on a number of factors directly linked with either supply or demand.

a. **Government tourism policy**

The Greek government's involvement in the promotion of tourism is growing. The main measures likely to favour future growth are:

- the designation of new holiday areas
- the development of special forms of tourism, such as health tourism, social tourism (for the less well-off) and winter tourism
- improvements in training for those working in the holiday industry
- publicity campaigns aimed at promoting incoming tourism
- the use of grants to help private industry get projects off the ground

The government attaches great importance to the quality of the touristic product.

b. **Environment**

Strict regulations govern tourist development in Greece, with the result that its impact on the environment has been much less adverse than in, say, Spain and Italy.

c. Tourist infrastructure

Private investors are increasingly being involved in the construction or improvement of the tourist infrastructure. Accessibility is being improved through road-building and airport expansion. In the area of tourist facilities the emphasis is on yacht marinas and golf courses.

d. Economy

As in Spain and Portugal, GNP growth in Greece is above the EC average, but the rate of inflation remains very high. Unemployment is tending to fall.

While rising living standards are helping to increase both domestic and outbound tourism, most Greek holiday-makers still remain within Greece. Incoming tourism benefits from the fact that Greece is still a low-cost holiday destination, creating a favourable competitive position vis a vis, for example, Spain and Italy.

e. Population

In 1989 Greece's population stood at 10.1 million; its low growth rate means that no increase in domestic or outbound tourism can be expected from this source.

Conclusion

Incoming tourism is expected to grow relatively quickly over the next few years, a conclusion supported by extrapolations from the supply and demand trends of the recent past. Factors likely to promote the growth of tourism are:

- the active tourism policy of the Greek government
- the improving economic situation
- improvements in the tourist infrastructure (notably the construction and improvement of roads and airports)
- the many areas of potential tourist appeal which have yet to be exploited.

Environmental problems, common to the whole Mediterranean area, are a focus of ongoing concern.

3. LOOKING AHEAD

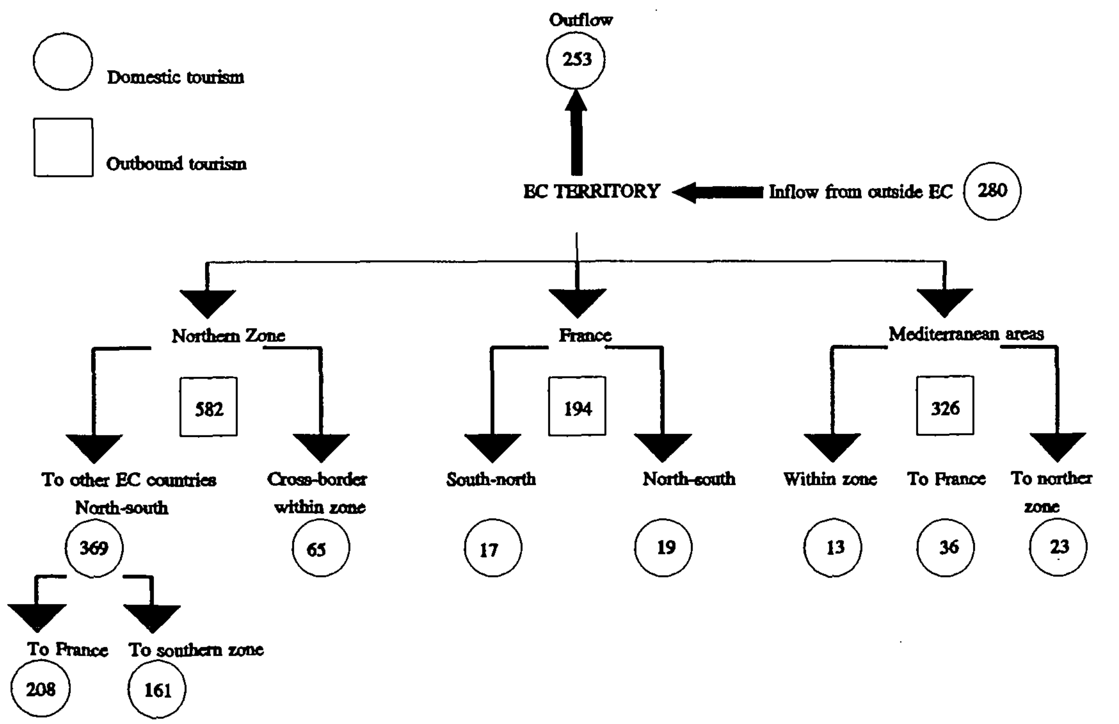
3.1 Total demand

Data are available for most countries on sleeper nights spent in various forms of registered accommodation. While definitions vary somewhat, not all forms of accommodation are included and the sometimes considerable volume of "informal" accommodation remains unregistered, at least an order of magnitude can be established.

Origin-destination tables have been compiled for the twelve EC countries showing where sleeper nights are generated and where they are spent (see appendix 1). These give a picture of cross-border flows within the Community. There are also considerable tourist flows within countries (domestic tourism) and flows into and out of the EC as a whole.

Figure 1 totals sleeper nights to produce an overall picture for 1988.

Figure 1 EC tourist flows (in millions of sleeper nights)
Source: OECD/WTO



The figure brings the northern countries of the EC together in one group and Portugal and the Mediterranean countries in another; France is in a group of its own. The northern countries are Ireland, Britain, the Netherlands, Belgium, Luxembourg, West Germany and Denmark; they are grouped together because they have been affected by similar trends in the area of tourism, with the volume of holiday-making consistently growing over time and with a clear north-south movement in both summer and winter. The southern countries (Portugal, Spain, Italy and Greece) are brought together because all show a high proportion of incoming tourism (mainly from the northern countries of the EC). France is put in a separate category because it is a major destination and transit country for tourist flows from the northern zone and domestic tourism is very strongly developed; it is thus in an intermediate position between the northern and southern countries of the EC.

Figure 1 points to the following conclusions:

- inflows from outside the EC and outflows to non-EC destinations are roughly in balance
- domestic tourism is predominant
- cross-border tourism is dominated by trips from the northern to the southern zone.

If we aggregate all sleeper nights whose origin and destination are both within the EC (some two billion), we see that no less than 80% involve domestic tourism and 20% international travel.

We also find confirmation of the often-voiced supposition that the great majority (75%) of sleeper nights spent outside tourists' countries of origin involve trips from north to south. In addition, while France generates only limited outbound tourism, domestic tourism within that country is highly developed (see table 1).

Table 1. Outbound tourism (in millions of sleeper nights)

	Northern zone	France	Southern zone	Within EC	Outside EC
Northern zone	65	208	161		
France	17	- -	19		
Southern zone	23	36	13		
Outside EC				280	
Within EC					253

Source: OECD/WTO

Total demand within the EC is made up as follows:

1. Outbound tourism intra-EC (in millions of sleeper nights):

North-south	388	
South-north	76	
Within zones	78	
Subtotal	------->	542

2. Domestic tourism 1102
3. Inflow into EC 280

TOTAL 1924

3.2 Likely future developments

The previous section calculated total touristic demand within the EC, together with the main origin-destination flow patterns. On the basis of this picture we can now consider what developments are likely in the future, in the framework of the zones distinguished in section 3.1. This forward look focuses on three aspects:

a. outbound tourism within the EC
b. domestic tourism
c. flows into and out of the EC.

3.2.1 Outbound tourism within the EC

The northern zone

This zone comprises Ireland, Britain, the Netherlands, Belgium, Luxembourg, West Germany and Denmark. With the exception of Ireland these countries are marked by relatively high and rising standards of living, resulting over the years in an ongoing increase in the volume of tourism. While the spectacular growth of the 1960s is now a thing of the past, we can expect the tourism generated by these countries to go on growing gradually over the next few years. Patterns of holiday-making are also becoming more varied, with (among other things) the average number of holidays per person increasing. Most holidays are taken in the summer and outbound tourism within the EC is dominated by north-south flows; Britain and West Germany are the main generators, the main destinations of British and German tourists being France, Spain and Greece. Germany is the main generator of tourism to Italy.

After several years of slow decline the Spanish tourist industry has recently experienced a dramatic contraction. While Greece's share in tourism generated in the northern zone is still limited compared with that of Spain or Italy, its potential can be regarded as considerable. Portugal would appear still to be in the initial stages of a growth trend.

In the longer term there will be shifts in the distribution of tourism among the Mediterranean countries but overall their popularity as holiday destinations seems unlikely to decline. Climate is a crucial factor here - indeed, the tourist trek from north to south has been going on for many centuries - and the northern countries will therefore remain net importers of tourist services, given that physical and geographical factors make import-substitution impossible or extremely expensive.

Portugal and Greece can enhance the appeal of the tourist product by avoiding the damaging consequences of overdevelopment and overcrowding. Improved links to the European road network would help Portugal break into the mass market, 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 growth in international tourist flows into France seems unending, notably from the Benelux countries and Germany in the northern zone. In terms of physical space and tourist accommodation France's capacity as a holiday destination is exceptionally large, while the country's scenic diversity has long offered foreign tourist a wide choice of holiday locations.

The scope for tourism in the northern zone (other than south Germany) is also limited in winter, and here too there are clear flows from north to south. Given the great pressure on the traditional ski resorts we can expect a shift of demand towards developing centres in e.g. the French Alps and the Pyrenees.

International tourist flows **within** the northern zone seem likely to increase, thanks notably to the growing popularity of the city breaks and other short holidays heavily promoted by the travel trade. Growth is also likely as a result of the opening of Euro-Disneyland and the Channel Tunnel.

France, the intermediate zone

As has already been noted, the scope for tourism is almost unlimited: in both summer and winter the country offers a vast range of holiday options. We can therefore expect France to remain a very popular holiday destination, not in the least thanks to the length and diversity of its coastline. France will retain its importance as a reservoir of tourist flows within the movement from north to south. However, since French people tend very much to prefer holidaying in their own country, large-scale tourist flows from France to other EC destinations are unlikely to develop in the near future.

The southern zone

The remaining zone comprises Portugal, Spain, Italy and Greece.

Recent developments in **Spain** would appear to indicate that the period of growth is over. The supply of accommodation has grown more quickly than demand, value for money has deteriorated and the tourist product is insufficiently differentiated. It may be too that in the aftermath of speculation on the large market in second homes many owners have been forced to let their property. A further possibility is that very heavy development has provoked an adverse reaction. Other explanations for the decline are the increasing pollution of the Mediterranean and its coasts and the growth in crime against tourists. These problems mean opportunities for competing countries, such as Greece and Turkey, which have recently begun to take off as major tourist destinations. The travel experience of holiday-makers from the northern zone is steadily expanding, encouraged by the travel industry and the flow of information on holiday opportunities.

Attempts to divert incoming tourism away from the coasts and towards inland Spain are unlikely to have much effect. A different segment of the market is involved here, with greater interest in historical and cultural matters, and tourists in this category are not currently found in any number on Spain's coasts.

A second country facing difficulties is **Italy**. The country has a greater range of touristic resources than Spain and possesses a number of popular coastal areas in both the north-east and the north-west. Italy's historic cities are world-renowned and attract millions of tourists every year. In the north of the country, finally, there are the famous lakes and extensive facilities for winter sports. Despite these advantages there is little optimism regarding future trends in tourism. The indications are that in some long-established tourist areas the pressure of visitor flows is generating resistance (Venice). Resorts on the Adriatic are facing problems as a result of marine pollution: industrial wastes from Northern Italy are discharged into the River Po and thence into the sea along busy sections of the coast. The algal blooms which have affected the Adriatic in recent years may be a result of this. Finally, certain of the factors mentioned in connection with Spain may also be at work.

More data are needed on quantitative changes in tourist flows to determine whether there is indeed a relative or absolute decline in tourism. Italy would appear to have a greater variety of tourist resources than Spain, thus avoiding an overdependence on particular market segments. One illustration is provided by Italy's historical and cultural assets, which enjoy considerably more fame than what Spain has to offer in this area.

Questions remain as to the extent to which the south of Italy can be further developed as a tourist destination. While this is a tourist-policy aim no great expansion is likely, given the area's infrastructural shortcomings. There are however indications that south-north flows out of northern Italy are growing, with not only France but also other EC countries as destinations; the economic position of northern Italy is of course considerably more favourable than that of the rest of the country.

Mass tourism got under way much later in **Portugal** than in Italy or Spain. Lisbon and Madeira are long-established destinations; the rise of the Algarve is of more recent date. Further growth in mass tourism can be expected in the future: in the Algarve, for example, the supply of accommodation has grown sharply, though it is doubtful whether the rest of the infrastructure has kept pace. There are also question marks over the quality of southern Portugal's beaches compared with that of competing areas on the Mediterranean. Thus far there seems to have been little attempt at deliberate regulation of the quantity and quality of accommodation, with the result that the same mistake may be being made as on some parts of the Spanish coast (on the island of Lanzarote efforts have been made to enforce a clear standard). A further uncertainty is introduced by the phenomenon of time-sharing and its possible impact on future trends.

Portugal's west coast still offers reasonable scope for further tourist development, thanks to its long and wide beaches. Tourism is less concentrated here than in many other attractive coastal areas. Improvements to the road network, with its link to the major French route south from Bordeaux, should help increase tourist flows. No spectacular developments are expected in inland Portugal.

The country with the greatest scope for expansion is **Greece**: while mass tourism has already reached some locations (Rhodes, Crete, Corfu, Attica) there is still considerable potential for further growth both on the hundreds of islands and on the coast of the mainland (e.g in Halkidiki and on the coast of Thessaly). As in many other countries the growth in tourism is mainly concentrated on the coasts. In this connection Greece has the advantage that its many islands mean it can offer great diversity, with attractions for both resident and travelling visitors; ferry services are good, and indeed the sea journeys represent an attraction in themselves. Another advantage, shared with other Mediterranean countries, is the stable climate. Finally, Greece is still a relatively low-cost destination.

While Greece still bears many traces of its ancient past this is unlikely to generate massive flows of visitors; aside from a small number of world-renowned locations the country's historic assets are on a small scale and are mainly of interest to scholars. The opening-up of new areas is one of the aims of government tourist policy. Given the dependence on charter traffic further expansion of airport capacity is of great importance.

3.2.2 Domestic tourism

As section 3.1 indicated, in many countries the volume of domestic tourism considerably exceeds that of incoming tourism. Domestic holiday-makers are often an essential factor in the development of facilities which are than also available for use by foreign visitors.

This is clearly visible in the impact of major population centres on tourist provisions. The development of outbound tourism has long been stimulated in part by the holiday and recreational travel engaged in by city-dwellers (as is the case of Barcelona and the nearby coastal region, Lisbon, Athens, Rome, Munich, Bordeaux, Copenhagen, London, Brussels, Paris and of course the Randstad in the Netherlands), the large scale of both day trips and residential holidays underlying the development of many of today's tourist centres.

In all EC countries domestic tourism is an important element in the development of tourist provisions. It should also be noted that particularly in the northern zone and France day trips are a major factor in the tourist industry; indeed, in terms of economic significance they occupy the first rank. However, insufficient data are available on the scale of this form of tourism.

Domestic tourism and day trips are likely to remain a dominant factor in the holiday and leisure industry of many countries, though the lack of data means that their importance can be seriously underestimated. In the northern zone and France rising living standards may bring a considerable increase in the number of people taking several short holidays every year in their own country.

Of importance in this connection are the forecasts of ongoing urbanization within the EC, the impact of which on both day trips and longer holidays could be considerable.

3.2.3 Tourist flows into and out of the European Community

Inflows

Here we are concerned with inflows into the EC of tourists from elsewhere. Using various matrices from appendix 1 we can show the number of sleeper nights spent in EC countries by non-EC tourists. The following grouping is used:

- European countries outside the EC:
  In 1986 74 million and in 1988 69 million sleeper nights (-7%)
- US and Canada:
  In 1986 77 million and in 1988 82 million sleeper nights (+6.5%)
- Australia and Japan:
  In 1986 22 million and in 1988 25 million sleeper nights (+14%)

The number of nights spent in EC countries by tourists from non-EC European countries has thus declined, while the figures for tourists from the United States, Canada, Australia and Japan have risen (with Japan showing the highest growth rate).

Nights spent in EC countries by non-EC tourists totalled around 270 million in 1986 and around 280 million in 1988, an increase of 4%. According to the World Tourism Organization this growth has been in progress for some years.

Inflows from the countries of eastern Europe are unlikely to be on any great scale: their economic backwardness means that it will be many years before tourist flows into the EC from the east are of any great significance.

There is also the question of the extent to which eastern Europe may begin to compete with the EC as a destination for long-distance travellers, in the light among other things of the many links between that region and the United States as a result of past emigration. Such factors are likely to have a favourable impact on incoming tourism in a number of eastern European countries. It remains to be seen to what extent the EC can share in the benefits of this development.

The EC's position is also affected by the attraction of the many other possible destinations for North American, Japanese and Australian tourists, with Europe's historical and cultural assets having to compete with such exotic locations as Thailand, Indonesia, Singapore and Central and South America.

Outflows

Here we are concerned with flows of tourists from places of origin within the EC to destinations elsewhere. Nights spent outside the EC by EC-based tourists totalled 207 million in 1986 and 253 million in 1988, an increase of 22%. Outflows have been increasing at such relatively rapid rates for some years, major destinations including Austria, Switzerland, Yugslavia, the United States, Canada and Australia; the popularity of countries like Japan, Thailand, Indonesia and certain African countries is also known to be increasing. Eastern-bloc countries have also enjoyed increased popularity among EC tourists in recent years.

Up to 1988 inflows exceeded outflows, but the trends are such that within a few years the position may be reversed; in this regard there will be reduced pressure on the EC's holiday regions.

APPENDIX 1

ORIGIN-DESTINATION MATRICES

Origin-destination matrix for the 12 EC countries: numbers of sleeper nights spent in all registered accommodation (1986, 1987 and 1988 figures, x 1000); domestic tourists in millions (underlined figures)

COUNTRY OF ORIGIN		COUNTRY OF DESTINATION												Total to EC countries (millions)
		D	F[1]	I	NL[2]	B	L	GB	EIR[3]	DK	GR	E[4]	P	
West Germany	86	203,42	76388,00	44724,79	6932,16	1512,16	139,14	16391,00		3275,70	7592,94	23591,71	2532,32	190,2
	87	207,60	78836,00	47570,75		1561,27	153,96	15665,00		2921,02	7715,10	26071,48	2789,47	190,2
	88	216,17	80201,00	48064,70	5638,00	1691,01		17226,00		2818,40		24635,74	2781,18	191,1
France	86	1345,33	191,00	7594,80	583,54	972,14	81,54	12212,00		131,50	2580,60	6202,53	1188,57	32,9
	87	1396,95	192,50	7812,90		972,36	87,55	16709,00		137,03	2729,91	6809,65	1134,84	38,4
	88	1466,82	193,70	7468,40	619,00	1010,80		14045,00		138,01		7115,04	1254,33	36,0
Italy	86	1165,25	23146,00	242,97	334,52	247,68	16,99	6128,00		117,67	1517,46	3894,03	312,72	36,9
	87	1247,02	26655,00	243,08		269,56	18,53	9235,00		137,73	1756,64	4312,62	372,16	44,4
	88	1413,47	28198,00	250,84	462,00	304,33		8507,00		153,45		4650,71	426,70	46,3
Netherlands	86	5336,09	34580,00	3658,96	66,3	3323,08	836,50	4373,00		598,26	2061,03	3895,46	1131,89	59,8
	87	5641,00	32923,00	3794,59	71,0	3592,86	850,36	5162,00		540,30	1756,98	3391,72	1221,31	58,9
	88	5690,24	33411,00	3955,79	65,8	4069,12		5566,00		509,37		3324,09	1649,85	59,9
Belgium	86	1008,44	27099,00	2644,97	1054,97	21,83	526,11	1997,00		--	704,83	2803,08	335,63	38,2
	87	1047,47	26423,00	2687,90		20,72	532,47	1913,00		--	738,40	3623,63	334,62	38,2
	88	1080,11	26640,00	2848,29	856,00	21,90		2194,00		--		3698,17	410,82	39,0
Luxembourg	86	161,16	5	263,14	22,46	178,22	0,18	98,00		--	--	171,76	24,81	0,9
	87	169,14	5	284,48		173,40	0,16	177,00		--	--	199,51	21,89	1,1
	88	184,54	5	308,65	25,00	167,43		169,00		--		240,74	20,86	1,1
Gr. Britain	86	2577,55	58598,00	7123,55	1535,57	1150,21	65,65	255,0		375,09	8692,38	33824,66	5992,65	199,9
	87	2547,04	60553,00	7067,16		1080,62	65,48	248,0		358,52	8307,08	33757,65	5742,46	120,9
	88	2559,00	62711,00	6583,82	1511,00	974,78		253,0		347,98		31291,49	5414,87	119,5
Ireland	86	64,60	6	236,14	53,37	32,95	3,52	9267,00	7,6	--	--	--	261,28	10,1
	87	68,02	6	247,37		32,10	5,53	8245,00	10,1	--	--	236,77	293,77	9,2
	88	98,13	6	264,06	54,00	37,50		10600,00	12,3	--		196,14	259,35	11,5
Denmark	86	1356,73	5134,00	1295,69	181,81	71,92	14,15	2443,00		11,75	1305,02	915,05	406,42	13,1
	87	1332,21	4999,00	1450,51		85,03	16,51	1967,00		11,60	1336,63	1577,97	420,42	13,4
	88	1349,13	5080,00	1473,33	217,00	90,04		1912,00		12,32		1275,85	425,28	12,1
Greece	86	209,10	--	503,69		57,54	--	1344,00		--	10,56	--	12,56	2,2
	87	225,20	--	507,25		59,51	3,78	1943,00		--	10,39	84,69	14,92	2,8
	88	264,54	--	529,04		77,41		1846,00		--	10,78	84,08	21,66	16,4
Spain	86	412,11	6338,00	1386,99	231,37	174,25	--	6108,00		--	236,84	47,17	1532,36	16,4
	87	459,26	7435,00	1685,41		187,24	13,08	7106,00		--	282,73	52,43	1632,67	19,1
	88	536,01	7785,00	1935,17	310,00	213,84		7780,00		--			1767,08	20,6
Portugal	86	83,64	7	173,27	7	70,97	--	883,00		--	--	658,04	11,06	1,9
	87	92,72	7	183,72		65,68	7,68	689,00		--	--	718,10	14,47	1,7
	88	115,06	7	220,64	7	69,38		874,00		--	--	687,37	12,00	2,0

	COUNTRY OF DESTINATION											
In millions	D	F	I	NL	B	L	GB	EIR	DK	GR	E	P
EC total 86 exclusive 87 domestic 88 89	13,7 14,2 14,8	231,3 237,8 244,0	69,6 73,3 73,6	10,9 9,7 11,1	7,8 8,1 8,7	1,7 1,8	61,2 71,1 70,7		4,5 4,1 4,0	24,7 24,6	76,0 80,8 77,2	13,7 14,0 14,4
EC total 86 inclusive 87 domestic 88 89	21,7 221,8 230,9	442,3 430,3 437,7	312,6 316,4 324,4	77,2 75,52 81,7	29,6 28,8 30,6	2,0 1,9	316,2 319,1 323,7		16,3 15,7 16,3	35,3 35,0	123,2 133,2	25,2 25,5 26,4
World 86 total 87 exclusive 88 domestic 89	27,8 29,1 30,2 33,6	332,2 339,9 347,1	99,2 106,4 107,0	13,9 12,6 14,4	9,8 10,1 10,6	1,9 1,9	159,1 178,3 168,1		8,5 8,2 8,0	35,4 35,5 36,0 37,0	87,7 92,4 88,3	16,6 17,1 17,8
World 86 total 87 inclusive 88 domestic 89	231,2 236,7 246,4	523,2 532,4 540,8	342,2 349,5 357,8	80,2 78,4 85,0	31,6 30,8 32,5	2,1 2,1	414,1 426,3 421,1		20,3 19,8 20,3	45,9 45,9 46,8	134,9 144,8	28,1 28,6 29,8

Notes:
1. Based on updating of a border survey conducted in 1982.
2. Owing to reorganization of the foreign-travel statistic maintained by the Central Bureau of Statistics the figures from 1988 onwards are not directly comparable with earlier data.
3. In the case of Ireland no figures are available on the numbers of nights spent by foreign tourists in all types of accommodation.
4. Nights in gold- and silver-star hotels only.
5. Figures for Belgium include Luxemburg.
6. Figures for Britain include Ireland.
7. Figures for Spain include Portugal.
8. In the case of France and Britain the figures have been adjusted to make them comparable with those for the rest of the EC.

Sources: OECD 1987, 1988 en 1989.
WTO 1987 en 1988.
CVO 1986, 1987, 1988, 1989.

Origin-destination matrix from the 12 EC countries to certain other countries:
numbers of sleeper nights spent in all registered accommodation
(1986, 1987 and 1988 figures, x 1000)

COUNTRY OF ORIGIN		COUNTRY OF DESTINATION										Total to non-EC countries (millions)[8]
		Norway[1]	Sweden	Finland[1]	Austria	Switzerland	Yugoslavia	USA[5]	Canada[6]	Australia	Japan[7]	
West Germany	86	495,98	1285,97	250,08	56055,41	14763,90	19727,52	669,85	2727,20	785,40	49,14	100
	87	505,17	1194,29	280,95	54937,06	14436,30	20043,40	952,12	3038,70	999,10	53,54	113
	88	539,33	1377,21	321,59	56058,73	14798,80	19790,25	1153,36	3580,90	1235,30	56,94	119
France	86	109,72	156,81	54,38	2702,65	2664,30	1440,50	439,61	1807,90	192,70	35,32	16
	87	119,52	146,82	61,89	2666,49	2607,40	1362,82	544,44	2322,50	237,00	37,19	18
	88	119,90	151,35	66,43	2651,61	2494,60	1222,23	618,44	2841,80	291,10	40,46	20
Italy	86	-	87,69	50,58	1518,74	1321,50	4645,28	262,27	836,40	382,00	18,82	13
	87	-	108,19	67,28	1698,82	1408,90	4980,85	318,82	999,90	336,90	20,88	15
	88	-	110,25	81,84	2891,25	1521,00	5365,70	356,53	1070,60	439,90	23,46	16
Netherlands	86	110,81	378,10	36,98	9175,79	3057,80	3825,52	162,74	969,50	148,50	14,48	19
	87	120,65	375,05	41,74	9320,25	2978,30	2875,29	201,69	1097,70	161,50	15,90	20
	88	343,97	343,97	46,27	9268,51	2963,40	3612,17	247,84	1206,60	209,20	15,85	21
Belgium	86	-	-	12,18	2162,89	1807,70	721,02	79,76	259,10	23,30	5,34	6
	87	-	-	15,37	2258,51	1826,30	810,52	98,88	264,80	28,00	6,12	7
	88	-	-	16,02	2348,35	1201,60	994,40	114,42	311,20	40,20	6,48	7
Luxembourg	86	-	-	-	4)	161,60	-	5,36	13,90	1,90	0,25	0,5
	87	-	-	-		165,80	-	7,82	13,90	2,80	0,36	0,6
	88	-	-	-		166,70	-	9,68	17,40	2,80	0,34	0,7
Great-Britain	86	365,14	333,10	103,34	4297,86	2901,60	5324,83	1133,68	5737,00	2674,80	142,11	41
	87	346,95	301,57	116,55	4249,77	2667,70	6056,75	1362,48	5699,20	3022,90	148,30	47
	88	333,14	311,70	131,71	4213,10	2570,00	5859,93	1818,03	6813,50	3956,00	154,58	54
Ireland	86	-	-	2)	37,68	-	83,53	93,93	179,40	110,90	2,23	1,6
	87	-	-		28,27	46,20	114,10	96,02	186,00	148,90	2,71	1,9
	88	-	-		33,14	44,40	113,12	111,14	239,00	197,60	3,30	2,2
Denmark	86	575,72	627,69	53,88	907,49	198,90	1142,79	68,52	221,70	156,30	7,08	5
	87	630,61	644,63	62,20	969,64	199,10	988,15	96,44	220,10	215,80	7,27	5,5
	88	643,10	650,23	69,57	952,16	195,60	809,49	100,48	233,10	202,80	7,59	6
Greece	86	-	-	-	122,74	149,50	166,89	49,02	357,80	145,90	2,29	1,7
	87	-	-	-	161,97	134,10	185,07	50,25	332,50	94,00	2,38	1,8
	88	-	-	-	174,50	132,80	217,02	53,91	382,50	107,20	2,47	2,0
Spain	86	-	-	17,71	215,38	444,10	99,30	108,61	191,50	30,50	8,17	2,6
	87	-	-	23,01	285,93	453,00	132,80	129,56	195,70	37,40	10,08	3,0
	88	-	-	29,08	364,71	514,00	133,85	176,76	248,00	52,70	11,13	3,9
Portugal	86	-	-	3)	20,90	99,60	17,86	26,73	414,30	12,50	3,51	0,9
	87	-	-		35,96	101,20	19,63	27,25	320,50	13,90	4,13	0,9
	88	-	-		26,66	96,40	22,66	32,49	356,70	28,80	4,19	1,0

Notes:

1. Nights spent in hotel accommodation only.
2. Figures for Britain include Ireland.
3. Figures for Spain include Portugal.
4. Figures for Belgium include Luxembourg.
5. Tourist arrivals only.
6. Includes stays in homes of friends or family.
7. Visitor arrivals only.
8. Main countries only. In the case of countries for which no separate data are available on sleeper nights the average duration of stay was multiplied by the number of arrivals.

Origin-destination matrix from certain other countries to the 12 EC countries:
numbers of sleeper nights spent in all registered accommodation
(1986, 1987 and 1988 figures, x 1000)

COUNTRY OF ORIGIN		COUNTRY OF DESTINATION											
		D	F	I	NL*	B	L	GB	EIR[3]	DK	GR	E[4]	P
Norway	86	527,92	1)	599,14	121,82	57,01	--	2388,00		1109,98	1100,83	754,92	225,10
	87	488,23		570,17		49,64	--	2071,00		1001,14	1013,86	501,88	501,88
	88	481,78		492,27	119,0	58,08	--	1882,00		985,95		430,62	430,62
Sweden	86	1128,22	1)	1427,26	232,90	93,10	11,83	3658,00		1492,96	1646,71	1107,87	441,60
	87	1166,94		1624,41		97,57	11,40	3089,00		1569,55	1704,11	1178,81	451,42
	88	1296,42		1648,29	245,0	108,77		2981,00		1657,36		1211,57	570,10
Finland	86	261,24	4319,00	610,04	64,96	--	--	633,00		212,65	1235,42	490,21	180,67
	87	274,55	4005,00	763,58		--	--	1316,00		200,83	1311,31	--	236,02
	88	303,75	4136,00	733,02	72,0	--	--	775,00		203,94		--	304,76
Austria	86	940,91	2691,00	7099,05	--	56,63	6,20	1397,00		--	1691,12	--	155,10
	87	996,92	2301,00	7602,69	--	69,23	5,81	1378,00		--	1685,40	--	167,73
	88	1040,04	2334,00	7372,43	--	60,03		1195,00		--		--	160,74
Switzerland	86	1250,00	18422,00	6593,27	184,89	91,94	19,73	3416,00		--	1153,45	2271,68	379,24
	87	1308,22	17854,00	6785,50		97,58	16,24	3659,00		--	981,79	2475,49	373,81
	88	1365,08	17749,00	7079,05	208,9	95,55		4592,00		--		2400,84	370,76
Yugoslavia	86	343,48	--	510,34	--	--	--	447,00		--	453,20	--	7,13
	87	383,71	--	549,84	--	--	--	1008,00		--	430,85	--	7,01
	88	421,50	--	572,44	--	--	--	627,00		--			6,87
USA	86	3795,84	23202,00	4031,58	847,82	800,41	75,70	24613,00		436,38	521,72	1485,03	510,56
	87	4269,86	25477,00	5447,10		732,73	78,42	28940,00		467,35	799,35	1906,21	651,64
	88	3874,82	26300,00	5314,60	831,0	572,84		25520,00		398,78		1756,73	667,04
Canada	86	339,65	5884,00	655,43	180,47	87,72	7,16	8557,00		--	202,48	341,57	374,16
	87	327,47	5683,00	751,12		85,92	6,11	8234,00		--	235,25	226,70	358,00
	88	350,62	5687,00	731,45	204,0	90,74		8855,00		--		182,90	323,49
Australia	86	223,51	2011,00	635,31	2) 149,90	--	3,80	10860,00		--	--	--	42,89
	87	205,42	1952,00	628,30		--	2,96	11942,00		--	--	--	43,31
	88	204,64	1926,00	603,07	141,0	--		10963,00		--		--	40,56
Japan	86	868,42	3694,00	710,80	148,94	98,91	7,22	1754,00		--	207,68	421,86	54,01
	87	977,35	4229,00	984,80		110,14	4,38	2331,00		--	238,61	590,34	65,71
	88	1054,94	4540,00	1213,90	165,0	125,38		2944,00		--		639,23	73,80
Total from all	86	14,1	100,9	29,5	3,0	2,0	0,16	96,9		4,0	10,7	11,7	2,9
non-EC coun-	87	14,9	102,1	33,0		2,0	0,13	107,2		4,1	10,9	11,6	3,1
tries,	88	15,4	103,1	33,4	2,9	1,9		97,4		4,0		11,1	3,4
in millions	89				3,3								

Notes:

1. Figures for Finland include Sweden, Norway and Iceland.
2. Figures for Australia include New Zealand.
3. In the case of Ireland data are available only for the number of foreign-tourist arrivals in the country.
4. Nights in gold- and silver-star hotels only.

* Owing to reorganization of the foreign-travel statistic maintained by the Central Bureau of Statistics the figures from 1988 onwards are not directly comparable with earlier data.

Sources: - OECD, WTO.
- Central Bureau of Statistics.

In interpreting the table it must be borne in mind that data-collection systems may vary from one country to another.

A P P E N D I X 2

TYPE AND QUALITY OF DATA AVAILABLE, BY EC COUNTRY

COUNTRY	SUPPLY OF ACCOMODATION			DEMAND FOR ACCOMODATION		
	General	By region or holiday area	Sources	General	By region or holiday area	Sources
West Germany	Good, classified by type	Fair, classified into hotel-type and camping acc.	Statistisches Bundesamt, Stuttgart	Good	Good, classified by type of tourist	WTO/OECD Stat. Bundesamt Studienkreis fue Tourismus
France	Fair, classified by type	Fair, classified into hotel-type and camping acc.	Direction de l'Industrie Touristique	Good	Good, classified by type of tourist	WTO/OECD Dir. de l'Ind. Tour., Dir. du Tourisme
Italy	Poor	Poor		Good	Poor	WTO/OECD
Netherlands	Good	Good	Bedrijfschap Horeca, CBS	Good	Good	WTO/OECD, NBT, CBS, NRIT
Belgium	Good, classified by type	Good, classified from 1984 into hotel-type and self-catering. No EC regions	Nationaal Instituut voor de Satistiek	Fair, no figures for foreign tourists or trips by Belgians	Good, classified by type of tourist	NTS, WTO/OECD
Luxembourg	Poor	Poor		Poor	Poor	
Great-Britain	Good classified by type	Moderate, classification by types poor, not EC regions	English Tourist Board, Regional Boards	Good	Fair, classification by type of tourist based on other years	ETB,WTO/OECD
Ireland	Fair classified by type	Fair, good classification but limited number of years	Irish Tourist Board (Bord Failte)	Fair, few data on trips by Irish	Good, classified by type of tourist	Irish Tourist Board, WTO/OECD
Denmark	Fair classification by types	Moderate, poor	Danmark Statistik	Good	Good, classification satisfactory, years 1969-84	Danmark Statistik, WTO/OECD
Greece	Good classified by type	Fair, data on two years only, no EC regions	National Tourist Board (NTOG) NSSG	Good	Moderate, data for one year only	WTO/OECD, NTOG
Spain	Good, classified by type	Good, classification into hotel-type and self-catering	Anuario de Estadisti-cas de Turismo	Good, data on trips abroad by Spaniards	No good, years 1980, 1985, 1988	WTO/OECD, Anuario de Estadisticas de Turismo
Portugal	Good, detailed classification	Good, detailed classification	Secretaria de Estado do Turismo	Good, 1986 onwards	Good, 1986 onwards	Secretaria de Estado do Turismo

COUNTRY	EMPLOYMENT IN THE TOURIST INDUSTRY		
	General	By region or holiday area	Sources
West Germany	Moderate	Poor, only data for 1988 on hotel sector	Statistisches Bundesamt, Stuttgart
France	Good, classified by sector	Poor, no regional classification	UNEDIC, INSEE
Italy	Fair	Poor, no regional classification	OECD
Netherlands	Good	Fair	NRIT
Belgium	Fair	Poor, no regional classification	RSZ/RSVZ
Luxembourg	Poor	Poor	
Great-Britain	Good, classified by sector	Fair, regional classification for 1984 only	English Tourist Board, Department of Employment
Ireland	Moderate, hotel sector only	Poor, no regional classificationm no trend data	OECD
Denmark	Moderate, hotels and restaurants together	Poor, no regional classification, no trend data	OECD
Greece	Fair, various sectors, trend figures to 1981	Poor, no regional classification	NSSG
Spain	Fair, various sectors, years 1985 and 1988	Fair, regional classification for 1985 and 1988	Anuario de Estadisticas del Turismo
Portugal	Good	Good	Secretaria de Estado do Turismo

In general little information exists on other services used by tourists (restaurants, bars, shops, entertainments of various kinds); only in the case of Spain is some more detailed information available. This is not true of revenues from tourism, however: in this area adequate data are available for all twelve EC countries.

APPENDIX 3

REVENUES FROM TOURISM, 1984-1988, CORRECTED FOR INFLATION (INDEX, 1983 = 100)

COUNTRY	1984	1985	1986	1987	1988
West Germany	110.8	124.0	121.8	122.4	129.9
France	111.9	113.7	104.6	107.4	120.4
Italy	98.5	95.3	82.9	84.9	82.8
Netherlands	126.9	125.9	124.2	125.0	128.3
Belgium/Luxembourg	103.6	100.6	99.7	111.6	124.1
Great-Britain	109.7	122.8	120.1	130.4	123.3
Ireland	104.8	117.7	112.3	119.5	135.8
Denmark	105.3	105.6	103.4	106.1	108.7
Greece	120.7	136.0	145.2	151.5	149.2
Spain	113.6	115.6	117.7	134.0	136.1
Portugal	118.1	135.4	142.1	170.7	180.7

Source: OECD, 1989.

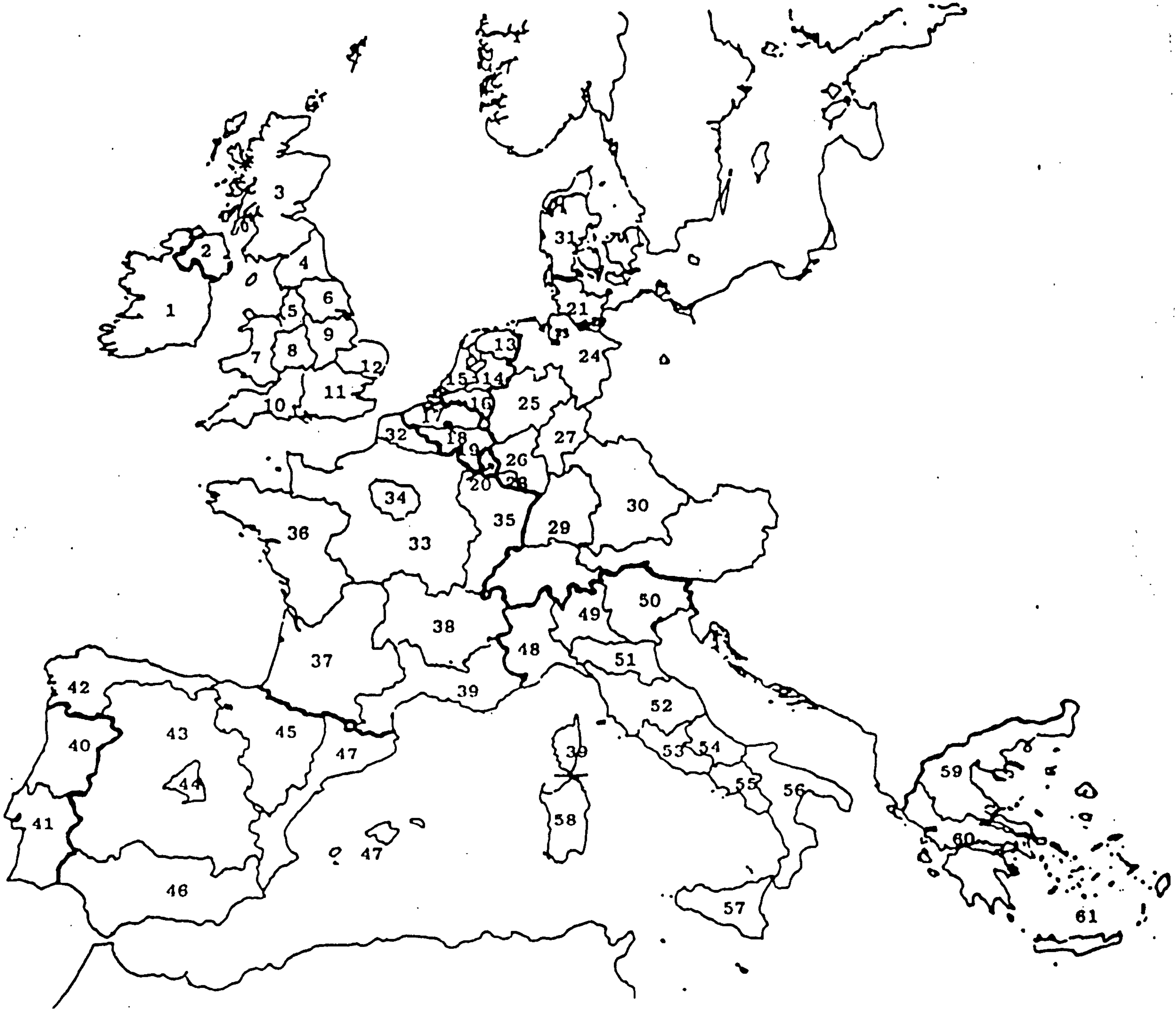
APPENDIX 4

FACTORS WITH A POSITIVE OR NEGATIVE IMPACT ON THE GROWTH OF TOURISM

	Supply trend 1980s	Demand trend 1980s	Government tourism policy	Environment	Tourist infra-struc-ture	Economy	Population growth 1990-2010
Ireland	++	+	++	0/+	0	+	--
Great-Britain	+	0	+	0	+	+	+
Netherlands	+	+	0/+	0	0	0	++
Belgium	0/+	+	0	0	0	-	-
Luxembourg	?	0	0	0	0	+	0
West Germany	0	0/-	+	0	0/+	+	--
Denmark	+	0	0	0	0	+	-
France	+	+	+	0/-	+	0/+	++
Portugal	++	+	+	0/-	+	+	++
Spain	+	-	0/+	-	0/+	+	++
Italy	+	0/+	0/+	-	0	0	0
Greece	++	+	++	0/-	+	+	0

A P P E N D I X 5

MAP OF NUTS-1 REGIONS



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LEGEND MAP OF NUTS-1 REGIONS

COUNTRY/REGION	CODE
IRELAND	
Ireland	1
GREAT-BRITAIN	
Northern Ireland	2
Scotland	3
North	4
North-west	5
Yorkshire and Humberside	6
Wales	7
West Midlands	8
East Midlands	9
South-west	10
South-east	11
East Anglia	12
NETHERLANDS	
Northern Netherlands	13
Eastern Netherlands	14
Western Netherlands	15
Southern Netherlands	16
BELGIUM	
Flemish Region	17
Brussels	18
Walloon Region	19
LUXEMBOURG	
Luxembourg	20
WEST GERMANY	
Schleswig-Holstein	21
Hamburg	22
Bremen	23
Lower Saxony	24
North Rhine Westphalia	25
Rhineland Palatinate	26
Hessen	27
Saarland	28
Baden-Wurttemburg	29
Bavaria	30
DENMARK	
Denmark	31

COUNTRY/REGION	CODE
FRANCE	
Nord and Pas de Calais	32
Paris Basin	33
Ile de France	34
East	35
West	36
South-west	37
Centre-East	38
Mediterranean	39
PORTUGAL	
Northern continental	40
Southern continental	41
SPAIN	
North-east	41
Centre	42
Madrid	43
North-west	44
South	45
East	46
ITALY	
North-west	47
Lombardy	48
North-east	49
Emilia Romagna	50
Centre	51
Lazio	52
Abruzzi Molise	53
Campania	54
South	55
Sicily	56
Sardinia	57
GREECE	
North	58
Central	59
South	60

APPENDIX 6

DISTRIBUTION OF TOURISM WITHIN THE EUROPEAN COMMUNITY ACCORDING TO THE NUMBER OF SLEEPER NIGHTS

DISTRIBUTION OF TOURISM WITHIN THE EUROPEAN COMMUNITY ACCORDING TO THE NUMBER OF SLEEPER NIGHTS

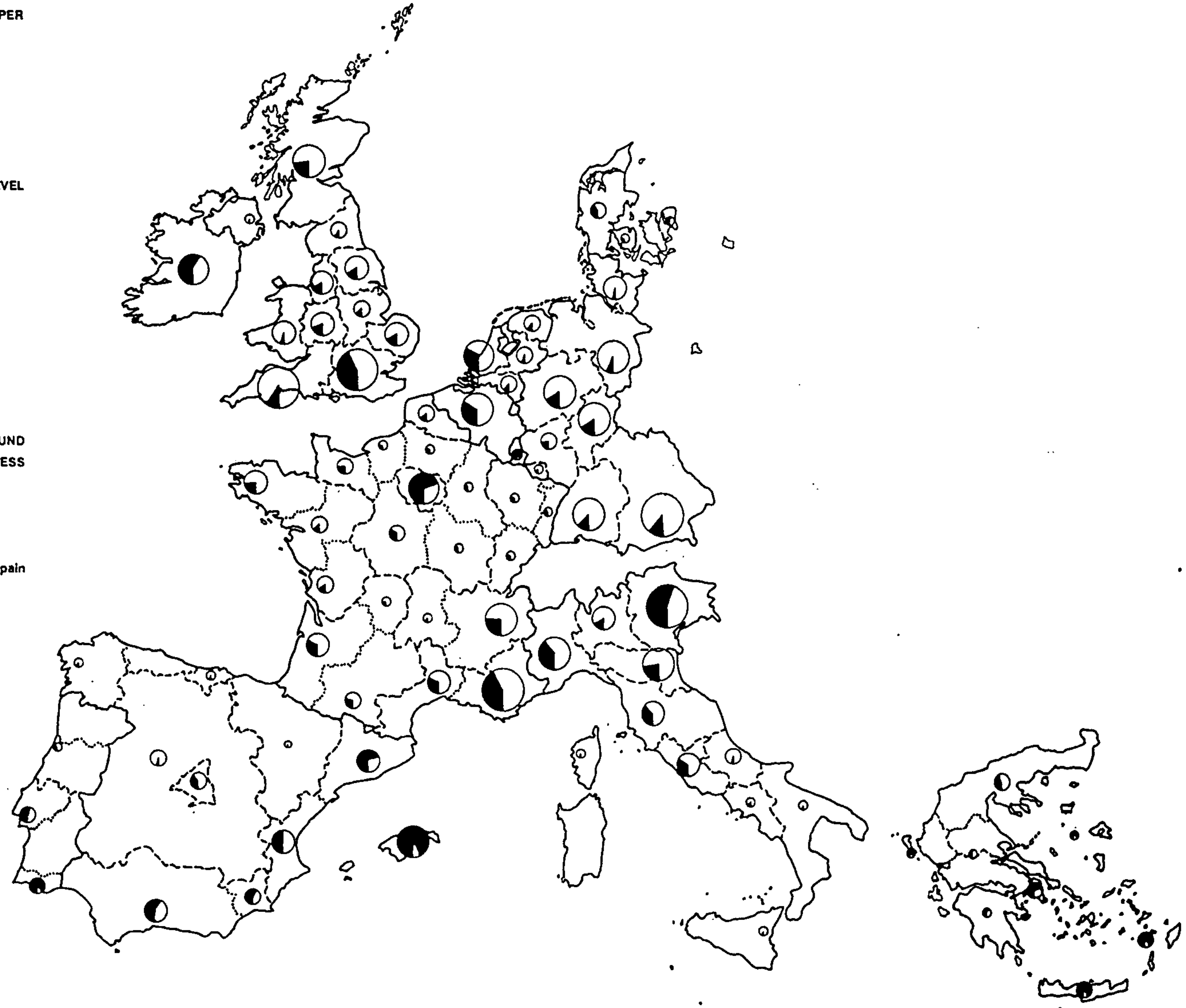
COMPILED FROM DATA AS KNOWN AT THE END OF 1990

LEGEND

NUMBER OF SLEEPER NIGHTS AT NUTS-1 AND NUTS-2* LEVEL IN BOTH CATERING AND SELF-CATERING SECTOR
(millions of people)

THE RED PART INDICATES THE SHARE OF OUTBOUND SLEEPER NIGHTS. AREAS NOT REPRESENTED DO HAVE LESS THAN 2 MILLION SLEEPER NIGHTS.

* For France, Greece, Portugal and the coastal areas of Spain only data at NUTS-2 level are available and represented.



The map shows the regional breakdown of the sleeper nights spent by tourists within the EC. The following table shows the regions for which sleeper nights are indicated on the map.

Ireland	Whole country (one NUTS-1 region)
Britain	All NUTS-1 regions
Netherlands	All NUTS-1 regions
Belgium	Whole country (breakdown into NUTS regions not possible)
Luxembourg	Whole country (one NUTS-1 region)
West Germany	NUTS-1 regions
Denmark	Jutland, Funen, and Copenhagen and surrounding area
Portugal	NUTS-2 regions on the basis of figures for the Costa Verde, Costa de Prata, Costa de Lisboa, Algarve and Madeira
Spain	NUTS-2 regions on coast, NUTS-1 regions inland
Italy	All NUTS-1 regions
Greece	Macedonia, Attica, Peloponnese, North and South Aegean, Crete, Ionic islands, Central Greece

In preparing the map use was made of the statistical data from parts 1 and 2 of the report; supplementary data were collected for certain regions mainly of limited touristic importance.

The distribution of the number of sleeper nights was compared with map data provided by Professor I.B.F. Kormoss concerning major tourist areas within the EC on the basis of accommodation capacity.