

Chapter 1

Tourism Trends in the OECD Area and Beyond

Over the last 20 years, tourism has made a significant contribution to world growth. International tourism has been the fastest-growing component of tourism, although for many OECD countries it remains less important than domestic tourism. Tourism has been variably impacted by the financial and economic crisis that hit the world economy in 2008 and 2009. International tourism has been affected more than domestic tourism and business tourism more than leisure tourism. Over the last two decades, competition on tourism markets has sharpened with the emergence of new destinations. In this context, the results from OECD countries are impressive. OECD countries continue to play a predominant role in international tourism both for outbound and inbound flows. Tourism enterprises have contributed greatly to the overall employment increase in the OECD. Demand trends have been changing tourism, in particular, there is a tendency towards more frequent trips during the year, coupled with shorter individual stays.

Introduction

The focus of this chapter is on short-term and long-term trends in the OECD area and beyond. It draws upon available statistics from several databases: OECD, World Tourism Organization, Eurostat and national sources.

This chapter covers, when data are available, the thirty member countries of the OECD, the five countries on the way to joining the Organisation (Chile, Estonia, Israel, the Russian Federation and Slovenia), as well as the five countries that participate in the enhanced engagement programmes with the Organisation (Brazil, China, India, Indonesia and South Africa), and Egypt and Romania (which have regular observer status in the Tourism Committee).

This chapter provides detailed information on trends in international tourism, in domestic tourism, changes in tourism demand, impacts of exogenous factors such as exchange rates and the role of tourism enterprises in terms of employment or investment.

Tourism and the global financial and economic crisis

The focus of this section is on short-term international and domestic tourism trends (2008 and 2009) in the OECD area¹ and beyond. At the time of drafting, it was still too early to have all data that could give a precise picture of the crisis in tourism, especially for the 2009 summer season which is a major period for the tourism year. In particular, there are very few data available on the supply side and data on domestic tourism are generally available only at a later stage.

The financial and economic crisis that hit the world economy in 2008 had a strong impact on tourism. During 2008, the crisis manifested by quarterly decreases in the OECD area GDP volume. The pace of decrease was accentuated in the end of 2008 and at the beginning of 2009. According to the *OECD Economic Outlook* published in June 2009, the whole OECD economic activity could reach its minimum in the 3rd quarter of 2009 and a weak and fragile recovery could start to be seen in the 4th quarter. In the US and Japan, the recovery could take place a quarter ahead of the euro area.

In 2008, tourism jobs accompanied the general downturn, though not as abruptly as in the industrial sectors (Table 1.13). On a yearly basis, on average for the OECD area, jobs in accommodation and food services still rose by 0.6% in 2008 with regard to 2007. However, this was less than the rise of 1.3% for services as a whole. The picture appeared rather contrasted between countries. Steep declines (2% or more) took place in New Zealand, the Netherlands, Ireland, the Czech Republic, Japan and Iceland. On the other hand, sharp rises (2% or more) were registered for Portugal, Finland, Mexico, the Slovak Republic, Sweden, Switzerland, Germany and Italy.

In tourism, some similarities with the general pattern of the crisis can be observed. However, specific factors have also played a role on tourism activity, notably the outbreak of the influenza A/H1N1 virus at the beginning of 2009 and the particular measures taken in many countries to support the sector. On another hand, divergences have to be pointed out between countries and types of tourism.

Globally, four aspects of the crisis can be pointed out:

- i) International tourism suffered a more acute downturn than domestic tourism. This is a well known pattern: international tourism is usually more volatile than domestic tourism. When the economic situation becomes difficult or uncertain, households tend to take their holidays in their countries rather than abroad. Another aspect of volatility is the tendency to reduce the reservation delays (*e.g.* use of last minute reservations), eventually with the advantage of heavy discounts.

The downturn appears more severe for:

- ii) Business travel than for leisure travel. Facing a slump in the overall demand, businesses make efforts to limit their costs, particularly the ones that are the easiest to control. On another hand, in the crisis, the global decline in private consumption expenses has appeared moderate relative to other demand components.
- iii) Hotels than for other types of accommodation. This effect can partly be considered as a consequence of the decrease in business travel since the latter entails extensive use of hotels compared with other types of accommodation. Nevertheless, leisure travellers may also have at least partly shifted to other cheaper types of accommodation.
- iv) Air transport than for other types of transport. The strong limitations of international tourism particularly for business purposes with specific impacts on long distance flights can be seen as one of the main factors. Airlines were thus driven to limit their flight capacities.

International tourism largely impacted

The year 2008 was a turning point after four years of steady growth from 2003 to 2007 (Table 1.1), with the negative trend starting at the beginning of the second half of 2008. On a yearly basis, the number of international arrivals at world level for 2008 was 1.9% higher than in 2007, 5.2 percentage points less than the growth rate registered during the previous 4 years. But the slowdown (-3.4 percentage points) was slightly less for the OECD countries with a growth rate of 1.4% in 2008. However, it is likely that the growth rates will become negative in 2009. In June 2009, UNWTO forecasted a global decline between -4 and -6% in 2009 compared to 2008. The detailed forecasts were still a bit lower for Europe, which represents a large share within OECD countries, and therefore, the equivalent forecast for the whole OECD area would be between -7% and -5%.

In 2008, only four OECD countries were spared by the downturn: Turkey reached a 2-digit exceptionally high growth (25.0%) of tourist arrivals while Korea (6.9%), Mexico (5.9%) and Austria (5.6%) reached slightly more than 5% growth rates. The other countries suffered either a slowdown or a decline in their corresponding growth rates. The steepest declines concerned Poland (-13.5%), the Netherlands (-8.2%) and more moderately Denmark (-5.6%), Canada (-4.5%), Luxembourg (-4.2%), Ireland (-3.7%), France (-3.2%), Spain (-2.3%), the United Kingdom (2.2%) and Italy (-2.1%). With respect to non-members, in three countries, arrivals grew in 2008 on a double-digit basis: Israel (24.4%), Egypt (15.9%) and Indonesia (13.2%). On the other hand, Romania (-5.5%) and China (-3.1%) recorded declines after periods of rapid growth.

Growth of international tourism receipts in current USD values appears rather high in 2008 compared to 2007: +10.2% at world level and +8.7% for the OECD countries (Table 1.2). A large part of the growth can be imputed to the depreciation of the US dollar, particularly *vis-à-vis* the euro: - 6.3% on average for 2008 compared with 2007. In volume, the growth rates of receipts are rather in line with those of the number of international

Table 1.1. **International tourist arrivals, 2003-08**

International tourist arrivals				
Type of indicator ¹		2007/2003 Average annual growth %	2008/2007 %	2008 million
Austria	TCE	2.1	5.6	21.9
Belgium	TCE	1.3	0.6	7.1
Czech Republic	TCE	7.3	-0.5	6.6
Denmark	TCE	7.9	-5.6	4.5
Finland	TF	7.8	1.8	3.6
France	TF	2.2	-3.2	79.3
Germany	TCE	7.3	1.9	24.9
Greece	TF	5.8	..	..
Hungary	TF	..	2.0	8.8
Iceland	TCE	8.1	4.6	1.1
Ireland	TF	5.4	-3.7	8.0
Italy	TF	2.5	-2.1	42.7
Luxembourg	TCE	1.4	-4.2	0.9
Netherlands	TCE	4.6	-8.2	10.1
Norway	TF	7.0	1.4	4.4
Poland	TF	2.2	-13.5	13.0
Portugal	TF	1.3	..	..
Slovak Republic	TCE	5.3	4.9	1.8
Spain	TF	3.9	-2.3	57.3
Sweden	TCE	5.2	..	..
Switzerland	THS	6.6	1.9	8.6
Turkey	TF	13.6	12.3	25.0
United Kingdom	TF	5.7	-2.2	30.2
Total Europe		5.5	1.0	403²
Canada	TF	0.6	-4.5	17.1
Mexico	TF	3.5	5.9	22.6
United States	TF	8.0	3.6	58.0
Total America		5.3	4.6	97.7
Japan	VF	12.5	0.0	8.4
Korea	VF	7.9	6.9	6.9
Australia	VF	4.4	-1.1	5.6
New Zealand	VF	4.0	-0.3	2.5
Total Asia-Oceania		6.4	2.6	23.4
Total OECD		4.8	1.4	524.1²
Brazil	TF	5.0	0.5	5.1
Chile	TF	11.6	7.7	2.7
China	TF	13.5	-3.1	53.0
Egypt	TF	13.0	15.9	12.3
Estonia	TF	6.8	..	..
India	TF	16.7	5.6	5.4
Indonesia	TF	5.4	13.2	6.2
Israel	TF	18.1	24.4	2.6
Romania	TCE	7.0	-5.5	1.5
Russian Federation	TF	0.4	..	..
Slovenia	TCE	6.3	1.1	1.8
South Africa	TF	6.5	5.5	9.6
Total World		7.1	1.9	922

1. TCE: International tourist arrivals at collective tourism establishments. TF: International tourist arrivals at frontiers (data exclude same-day visitors). VF: International visitor arrivals at frontiers (data include same-day visitors). THS: International tourist arrivals at hotels and similar establishments.

2. Estimate.

Source: World Tourism Organization.



StatLink  <http://dx.doi.org/10.1787/764380771355>

Table 1.2. **Travel receipts and expenditure, 2007-08**

Billion USD

	Travel receipts		Travel expenditure		Travel balance	
	2007	2008	2007	2008	2007	2008
Austria	18.9	21.8	10.6	11.3	8.3	10.5
Belgium	10.9	12.4	17.3	19.0	-6.4	-6.6
Czech Republic	6.4	7.7	3.6	4.6	2.7	3.1
Denmark	6.2	6.7	8.8	9.7	-2.6	-3.0
Finland	2.8	3.1	4.0	4.4	-1.2	-1.3
France	54.2	55.6	36.7	43.1	17.5	12.5
Germany	36.0	40.0	83.2	91.2	-47.2	-51.2
Greece	15.5	17.1	3.4	3.9	12.1	13.2
Hungary	4.7	6.0	2.9	4.0	1.8	2.0
Iceland	0.5	0.6	1.3	1.1	-0.8	-0.5
Ireland	6.1	6.3	8.7	10.4	-2.6	-4.1
Italy	42.7	45.7	27.3	30.8	15.4	14.9
Luxembourg	4.0	4.5	3.5	3.9	0.5	0.6
Netherlands	13.3	13.4	19.1	21.7	-5.8	-8.3
Norway	4.5	4.7	13.7	16.0	-9.2	-11.3
Poland	10.5	11.7	7.8	9.3	2.7	2.4
Portugal	10.1	11.0	3.9	4.3	6.2	6.7
Slovak Republic	2.0	2.6	1.5	2.2	0.5	0.4
Spain	57.6	61.6	19.7	20.3	37.9	41.3
Sweden	12.0	12.5	14.0	15.2	-2.0	-2.7
Switzerland	12.2	14.4	10.3	10.8	1.9	3.6
Turkey	18.5	22.0	3.3	3.5	15.2	18.5
United Kingdom	38.6	36.0	71.5	68.5	-32.9	-32.5
Total Europe	388.4	417.3	376.1	409.2	12.3	8.1
Canada	15.3	15.1	24.9	26.9	-9.6	-11.8
Mexico	12.9	13.3	8.4	8.5	4.5	4.8
United States	97.0	110.1	76.4	79.7	20.6	30.4
Total America	125.2	138.5	109.7	115.1	15.5	23.4
Japan	9.3	10.8	26.5	27.9	-17.2	-17.1
Korea	6.1	9.1	22.0	17.1	-15.9	-8.0
Australia	22.3	24.7	14.2	15.7	8.1	9.0
New Zealand	5.4	4.9	3.1	3.0	2.3	1.9
Total Asia-Oceania	43.1	49.5	65.8	63.7	-22.7	-14.2
Total OECD	556.7	605.3	551.6	588.0	5.1	17.3
Brazil	5.0	5.8	8.2	11.0	-3.2	-5.2
Chile	1.5	1.8	1.7	1.4	-0.2	0.4
China	37.2	40.8	29.8	36.2	7.4	4.6
Egypt	9.3	11.0	1.9	2.9	7.4	8.1
Estonia	1.0	1.2	0.7	0.8	0.3	0.4
India	10.7	11.8	8.2	9.6	2.5	2.2
Indonesia	5.3	7.4	4.9	5.4	0.4	2.0
Israel	3.1	4.1	3.3	3.4	-0.2	0.7
Romania	1.6	2.0	1.5	2.2	0.1	-0.2
Russian Federation	9.6	11.9	22.2	24.9	-12.6	-13.0
Slovenia	2.5	3.1	1.1	1.3	1.4	1.8
South Africa	9.1	9.6	3.9	4.2	5.2	5.4
Total World	857.0	944.0	857.0	944.0	0	0

Sources: Balance of Payments, International Monetary Fund (IMF), OECD data processing.

StatLink  <http://dx.doi.org/10.1787/764384203531>

arrivals. On the whole, OECD countries gained USD 48.6 billion more in 2008 than in 2007 whereas their expenses rose only by USD 36.4 billion. Thus, the balance improved by USD 12.2 billion for the OECD area as a whole.

However, trends differ among countries:

- The positive balance of American OECD countries increased by USD 7.9 billion, induced by a USD 10 billion rise in the US balance.
- The negative balance of the Asia-Oceania OECD countries was reduced by USD 8.5 billion, mainly due to the Korean deficit which diminished by USD 7.9 billion.
- For the European OECD countries, the positive overall balance was reduced by USD 4.1 billion. Most countries suffered a slight deterioration in their balances, particularly Germany, France, the Netherlands, Norway and Ireland. In these countries, the decrease in inbound flows was not compensated by corresponding decrease of outbound flows. Only a few traditional net exporting countries recorded a slight improvement in their balances: Spain, Turkey, Greece and Austria.

In line with tourist arrivals, international air transport has paid a large tribute to the crisis. According to International Air Transport Association (IATA) data, the volume of international passenger air traffic (measured by Revenue Passenger Kilometres) slowed down from a growth rate of 7.6% in 2007 to 2.4% in 2008. Air traffic started to decline by the summer of 2008 and in the first half of 2009, the decline became very evident, prompting IATA to forecast in July 2009 an overall –8% decline for 2009. IATA noticed a sharp reduction in business travel and a tendency to replace business class with economy class travel.

The high seasonality of tourism also has to be taken into account to obtain a correct overview of major trends (Box 1.1). However, it is too early to give a precise description of the tourism activity in 2009 compared with the general economic outlook especially because of the specific seasonal pattern of tourism. What can be drawn from preliminary and partial data is that tourism flows could have been more affected in the low season (mostly in the 1st quarter of 2009) than in the high season (3rd quarter of 2009), notably because the holiday travel behaviours can be considered as slightly less volatile than business travel behaviours.

Box 1.1. **Tourism and seasonality**

It is obvious that in most countries, tourism shows a strong seasonality during the year. In most OECD countries the summer season (3rd quarter) is when tourism activity is the highest and the winter season (1st and 4th quarters) when it is the lowest: in the European countries, for instance, the volume of tourism during the summer season might be twice as much as the corresponding volume during the winter season; the ratio would be around 1.5 between the summer season and the spring season (2nd quarter). Such large amplitudes certainly explain why it is common practice to analyse the variations of tourism by comparing the results of a period with the results of the corresponding period of the previous year. This practice will be followed here. Nevertheless, it has to be kept in mind that pitfalls have to be avoided: the method may create misinterpretations depending on the levels of the base year; on another hand, the practice has been totally abandoned for general economic analysis where the correction of seasonal variations has been widely adopted for a number of years.

Table 1.3. **International tourist arrivals, 2007-09**

Quarterly data compared with the corresponding quarter of the preceding year (percentages)

	Type of indicator ¹	2007				2008				2009	
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
Austria	TCE	-0.5	0.6	3.6	8.0	13.7	-0.6	2.6	4.3	-8.6	3.7
Belgium	TCE	2.7	-1.9	1.5	1.3	3.2	3.8	0.5	-0.5	-8.3	..
Czech Republic	TCE	8.8	1.7	-0.9	9.7	6.8	-0.4	-0.4	-6.3	-17.1	-8.7
Denmark	TCE	17.7	-0.7	-0.2	-1.5	25.1	-7.9	-8.8	-1.7	-35.8	1.3
Finland	TF	16.4	4.1	2.9	6.6	8.9	4.6	-3.9	-2.5	-9.9	-13.0
France	THS	-0.3	2.1	4.0	5.0	6.1	-3.7	-6.3	-5.2	-19.6	..
Germany	TCE	7.8	-0.3	3.3	5.7	5.4	4.3	0.8	-2.1	-8.9	-6.6
Greece	TCE	17.5	20.5	15.3	2.9	7.7	-1.9	0.3	-6.5	-28.5	..
Hungary	TF	-10.6	-11.8	-4.5	-0.3	4.6	1.4	-1.1	5.9	0.4	0.8
Iceland	TCE	32.9	16.6	6.5	5.3	1.6	1.5	4.8	9.2	-3.4	-0.1
Ireland	TF	6.4	0.9	5.6	3.3	4.3	1.3	-6.6	-5.2	-9.1	-11.9
Italy	TF	17.1	-0.3	8.0	3.9	-2.6	2.6	-3.7	-5.1	-5.4	-3.8
Luxembourg	THS	6.4	1.3	8.1	4.0	0.4	-4.2	-6.4	-6.2	..	..
Netherlands	TCE	10.1	-0.8	0.5	4.0	0.8	-11.8	-9.0	-10.1	-14.8	2.8
Norway	THS	2.4	1.9	1.2	6.3	-1.3	-0.5	-10.7	-3.9	-9.3	-14.3
Poland	TF	14.3	4.0	2.0	-10.4	-8.6	-11.2	-15.9	-17.3	-18.6	-12.7
Portugal	THS	7.6	4.4	8.0	7.0	34.8	12.3	10.2	3.0	-21.2	-6.5
Slovak Republic	TCE	-2.3	-1.0	6.7	15.8	9.8	16.7	-0.6	-5.5	-28.4	-31.3
Spain	TF	4.7	-0.5	1.2	1.4	5.2	1.2	-5.3	-9.0	-16.2	-8.2
Sweden	THS	0.9	2.7	7.1	3.9	10.5	5.0	-7.9	-2.7	-9.8	-1.0
Switzerland	THS	7.4	7.0	6.8	9.2	9.2	2.7	0.4	-4.3	-9.7	-6.9
Turkey	TF	17.5	15.7	18.4	18.7	14.6	17.4	9.4	10.0	-4.5	-1.0
United Kingdom	VF	6.1	0.4	-7.0	4.9	6.8	-1.2	-2.2	-13.0	-13.9	-4.4
Total Europe		6.8	2.3	3.9	4.4	6.3	0.6	-3.0	-4.7	-14.0	-5.1
Canada	TF	-3.2	-1.8	-1.7	-1.2	-1.9	-4.9	-4.6	-5.6	-8.2	-6.9
Mexico	TF	-3.7	4.8	2.2	-1.7	5.4	2.9	6.5	9.1	7.7	-19.2
United States	TF	9.1	7.8	12.1	15.2	15.4	7.6	3.2	-6.0	-14.3	-6.6
Total America		3.6	5.2	7.0	7.9	9.9	4.2	2.5	-2.5	-8.2	-9.6
Japan	VF	13.3	10.7	16.8	14.2	10.6	9.3	-2.0	-16.0	-27.2	-30.1
Korea	VF	2.2	1.4	4.6	10.5	12.0	6.3	4.0	5.9	24.3	6.8
Australia	VF	4.6	3.7	2.7	-2.0	0.4	-1.7	-0.4	-2.5	-3.5	0.6
New Zealand	VF	3.2	2.7	3.6	-1.3	4.2	-3.6	-2.1	-1.5	-7.4	2.3
Total Asia-Oceania		6.8	5.4	8.3	7.4	7.8	4.4	0.1	-5.0	-4.7	-8.4
Total OECD		6.2	2.9	4.7	5.2	7.1	1.4	-1.8	-4.3	-12.5	-6.5
Brazil	TF	..	..	..	..	4.9	-4.4	2.5	-4.1	..	..
Chile	TF	10.3	10.6	14.6	10.5	14.7	-1.5	6.9	5.6	0.5	11.9
China	TF	10.0	10.6	9.3	8.8	9.6	-3.0	-9.3	-7.7	-11.3	-5.1
Egypt	VF	15.1	17.3	22.6	32.0	25.1	22.6	15.1	3.7	-13.4	-4.0
Estonia	TCE	1.9	-3.9	-5.0	-2.8	5.9	5.0	2.5	3.1	-8.2	-9.1
India	TF	18.9	10.9	9.4	13.6	12.2	9.3	8.6	-4.9	-13.8	-1.8
Indonesia	TF	20.0	17.7	23.2	19.7	15.7	8.1	13.1	16.2	0.0	-5.9
Israel	TF	-8.8	-11.1	48.7	42.6	31.5	36.4	18.7	13.6	-21.5	-15.3
Romania	TCE	9.0	17.4	13.1	7.4	8.1	-2.9	-11.1	-10.1	-17.8	-15.6
Russian Federation	VF	7.7	-0.4	-1.8	4.7	3.4	6.2	8.8	-6.3	-10.8	-11.5
Slovenia	TCE	10.6	10.6	9.7	0.6	5.6	2.2	-0.2	-1.1	-10.1	-9.4
South Africa	VF	10.3	8.2	9.4	5.5	12.0	3.8	1.1	5.7	-2.2	5.3
Total World		7.6	5.4	6.9	7.3	8.5	4.0	-0.5	-2.3	-10.5	-6.5

1. TCE: International tourist arrivals at collective tourism establishments.

TF: International tourist arrivals at frontiers (data exclude same-day visitors).

VF: International visitor arrivals at frontiers (data include same-day visitors).

THS: International tourist arrivals at hotels and similar establishments.

Source: World Tourism Organization.

StatLink  <http://dx.doi.org/10.1787/764405621532>

According to monthly and quarterly data (Table 1.3), tourism activity started to decline in the second half of 2008 in parallel with the general economic activity. As for international tourism, the contraction of its overall volume approximately followed the same calendar, but with more ample variations. More precisely, the general pattern, with exceptions, consists of a buoyant first half of the year 2008 and a sharp decline in the second half of the year, which became even stronger during the first half of 2009. International arrivals to all OECD countries started to decrease (-1.8%) in the summer of 2008. This is a moderate decrease considering that the reference level in 2007 was well above (+4.7%) the level of 2006. The contraction was accentuated in the last quarter of 2008 (-4.3%) and even more in the first quarter of 2009 (-12.5%). However, the reference quarter of the preceding year was at a high level. With a more moderate reference, the second quarter of 2009 recorded another decline (-6.5%).

Domestic tourism appears more resistant

Domestic tourism appears more resistant than international tourism. This is a general pattern that is confirmed in the present crisis by the partial available data. This is illustrated by Table 1.4 where data on quarterly number of nights spent in hotels and similar establishments have been gathered for the OECD European countries. The data are split between resident and non-resident customers. In general, the hotel type of accommodation represents a largely higher proportion between all types of accommodation for non-resident visitors than for residents. Therefore, particularly for residents, these data have to be confirmed by other data covering more types of accommodation.

In many European countries, the decrease in the numbers of nights spent by non-residents occurred before the decline for residents. The decline was much more severe for non-residents, particularly in the first quarter of 2009 and starting as early as the second quarter of 2008 when declines for residents generally started in the third quarter. Spain appears to be among the exceptions, at least until the first quarter of 2009 when the decline was sharper for residents than for non-residents.

Tourism trends in the OECD area and beyond

Over the past twenty years, tourism has been playing its part in economic globalisation (see also Chapter 2), on the basis of three main factors:

- the dynamism of the world economy, which has seen new economic powers emerge while industrial countries have continued to exhibit appreciable growth and with it, rising incomes;
- the development of new and cheaper means of transport; and
- the intensive use of information and communication technologies (ICT) in tourism and their impact on value creation chains.

The image of tourism has also been transformed in at least three aspects:

- on the supply side, competition between destinations has become sharper;
- on the demand side, new international customers have emerged; and
- on the demand side, people are making more trips but for shorter periods.

In this context, OECD countries continue to play a predominant role in world tourism, on both the supply and demand sides.


Table 1.4. Nights spent in hotels and similar establishments, 2007-09¹
 Quarterly data compared with the corresponding quarter of the preceding year (percentages)

	Origin of tourists ²	2007				2008				2009	
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
Austria	NR	-2.4	0.5	3.4	6.8	13.0	-7.0	1.2	5.2	-11.5	7.4
	R	-0.3	6.0	6.1	8.8	5.7	-0.3	3.5	2.5	0.0	-2.0
Belgium	NR	4.1	0.7	5.1	3.3	4.6	2.6	0.4	-1.7	-9.5	..
	R	16.1	6.8	7.6	13.5	12.7	3.9	1.2	0.8	-4.8	..
Czech Republic	NR	8.8	1.7	-0.9	9.7	6.8	-0.4	-0.4	-6.3	-17.1	-8.7
	R	-6.6	2.5	-2.0	7.0	8.1	-0.3	-5.0	-3.1	1.0	8.5
Germany	NR	7.6	-1.5	4.8	6.5	4.7	4.6	1.0	-2.3	-7.9	-8.8
	R	2.9	3.4	2.3	2.8	4.5	1.5	1.0	0.6	-3.5	0.0
Denmark	NR	5.9	-4.6	-3.7	-5.2	-0.4	0.0	-5.1	-7.4	-16.1	-9.1
	R	11.7	15.3	11.8	6.1	-0.7	0.9	-6.9	-5.2	-8.2	-14.4
Finland	NR	13.6	6.1	3.1	3.7	10.9	3.0	-0.7	-1.6	-13.0	-15.1
	R	4.1	2.8	4.6	5.9	3.0	4.2	0.1	-0.7	-5.7	-3.8
France	NR	3.4	4.3	5.4	7.5	9.6	-2.9	-4.6	-5.4	-20.3	..
	R	3.2	0.7	2.8	3.7	2.6	1.3	-1.3	-3.8	-6.2	..
Greece	NR	14.4	15.0	11.9	-0.8	8.5	-0.3	0.4	-8.1	-29.6	..
	R	10.3	14.1	20.9	17.7	1.5	1.3	1.6	-1.4	-14.3	..
Hungary	NR	0.6	-1.4	0.0	8.1	7.5	-1.7	-3.4	-5.6	-16.6	-9.4
	R	12.7	4.5	2.1	5.2	1.0	1.5	2.4	1.4	-13.0	-8.8
Ireland	NR	..	..	..	..	2.8	5.7	-3.1	-16.9	-20.1	-18.9
	R	..	..	..	..	8.3	-8.3	-2.8	6.3	-10.5	..
Iceland	NR	27.3	17.0	5.5	4.0	6.5	-4.6	4.3	7.8	..	..
	R	7.7	15.9	9.8	18.5	9.6	7.1	-2.4	-21.4	..	..
Italy	NR	2.8	3.2	6.1	6.7	6.2	-9.7	-5.0	-8.6	-15.2	..
	R	-5.2	1.9	1.9	1.4	4.4	-3.0	-3.1	-6.0	-6.5	..
Luxembourg	NR	6.4	2.0	9.0	6.1	4.0	-3.8	-7.5	-8.6	..	..
	R	-1.7	0.2	-2.0	9.8	-11.9	13.8	3.6	-5.6	..	..
Netherlands	NR	13.2	-1.7	1.3	2.3	-3.1	-7.0	-9.9	-12.1	-14.7	-5.2
	R	23.3	12.7	10.8	9.2	-0.1	-0.4	-2.3	-3.4	-4.5	-1.8
Norway	NR	5.0	2.8	2.5	3.1	-1.8	2.1	-8.2	-1.1	-11.7	-14.4
	R	6.4	6.0	2.3	4.9	-1.7	4.1	-2.1	-4.0	-3.2	-3.1
Poland	NR	19.5	6.1	2.2	3.8	1.5	-1.6	-7.9	-12.9	-14.4	-12.0
	R	14.4	17.9	12.4	12.8	9.2	11.7	9.0	5.3	-0.5	-6.6
Portugal	NR	6.0	2.6	5.7	3.7	9.9	-0.4	-3.7	-9.3	-20.6	-11.2
	R	12.7	2.0	4.1	8.0	4.6	-2.6	4.0	-2.2	-9.2	8.0
Slovak Republic	NR	-3.4	0.3	2.8	7.8	0.7	9.9	-1.3	-9.4	-32.0	-29.2
	R	0.1	-1.2	6.6	9.6	16.0	16.1	14.5	5.3	-4.3	-7.0
Spain	NR	7.6	-0.3	2.0	4.8	4.6	0.4	0.5	-6.6	-14.7	-7.6
	R	3.6	3.5	0.4	1.0	9.4	-6.9	-3.1	-10.5	-16.9	-0.3
Sweden	NR	3.2	3.3	4.8	5.3	11.2	5.1	-4.4	-4.5	-9.0	3.7
	R	5.8	3.8	5.8	5.3	0.2	9.0	1.5	-1.1	-1.8	-4.1
Switzerland	NR	5.2	7.1	5.7	9.0	11.1	0.3	1.1	-2.5	-12.1	-6.3
	R	-0.4	1.0	0.8	6.1	6.2	0.1	4.1	-2.0	-6.1	-2.6
United Kingdom	NR	7.9	3.9	-1.6	3.6	4.6	-3.1	-2.1	-9.5	-13.8	-4.7
	R	8.9	2.9	5.2	-7.4	4.1	5.8	-10.5	-1.4	-16.8	..

1. European OECD countries.

2. NR: non-residents, R: residents.

Source: Eurostat (Statistical Office of the European Communities).

StatLink  <http://dx.doi.org/10.1787/764423534021>

This chapter examines medium- and long-term tourism trends, drawing upon available statistics (Box 1.2). The tourism statistics system has been greatly strengthened during the period under review, although it is still not as complete as it should be. Thus, detailed data from the Tourism Satellite Accounts are still too scarce to allow analysis over sufficiently long periods.

Box 1.2. **Availability and quality of statistical data on tourism**

This chapter relies primarily on statistics covering the period 1990-2008 (eventually partial data for 2009). A few isolated statistics relate to earlier years. It must be borne in mind that the base series still lack statistical continuity. The authors have attempted, to the extent possible, to identify statistical discontinuities. There have been methodological changes over the course of these years, especially in survey techniques.

The paper draws upon several different databases:

- the OECD databases, with respect to tourism data, Balance of Payments data on services, national accounts data, exchange rate and price data, structural statistics on enterprises;
- the World Tourism Organization, for data on international tourism flows, particularly for non-OECD countries;
- Eurostat, for statistics on tourist accommodation; and
- national sources for Tourism Satellite Accounts, and occasionally, for other data.

The focus of this paper is on the 30 member countries of the OECD, the five countries on the way to joining the Organisation (Chile, Estonia, Israel, the Russian Federation and Slovenia), as well as the five countries that participate in the enhanced engagement programmes with the Organisation (Brazil, China, India, Indonesia and South Africa), and Egypt and Romania (which have regular observer status in the Tourism Committee).

Domestic tourism is playing a predominant role

Domestic tourism, i.e. travel by residents within their own country, far outweighs inbound tourism. For the OECD area, domestic tourism consumption accounts for about 75% of tourism consumption within the zone, with the remainder representing inbound tourism. Domestic tourism has been long regarded with less interest, mainly because it is not a source of foreign exchange. Consequently, it has tended to be overlooked in tourism statistics (Box 1.3). The Tourism Satellite Account (TSA) has the advantage of placing a value on tourism flows; thus, in general, for equal flows of resident and non-resident tourists, the latter generate much greater tourism spending. Nevertheless, domestic tourism flows are far more important than inbound tourism flows in most developed countries (Table 1.5).

The share of domestic tourism in a country's total internal tourism varies greatly; it is nearly 95% in Japan but only around 36% in Poland. A number of factors explain this discrepancy:

- country size: the bigger the country, the more important domestic tourism is likely to be;
- geographic location: a country that is readily accessible to residents of other countries will attract more visitors than one that is isolated. Ease of access is influenced mainly by the availability of convenient and inexpensive means of transport;
- accommodation capacity; and
- points of attraction: nature (*e.g.* sea, mountains), culture (*e.g.* museums), etc.

Table 1.5. **Tourism Satellite Account: Internal tourism consumption (ITC)**

	Year	Internal tourism consumption <i>Billion USD,¹ current prices</i>	Domestic tourism consumption <i>As a percentage of ITC</i>	Inbound tourism consumption <i>As a percentage of ITC</i>
Australia	2007-08	79.36	73.4	26.6
Austria	2007	41.60	49.7	50.3
Canada	2008	55.31	79.1	20.9
Czech Republic	2007	11.54	45.1	54.9
Denmark	2006	12.23	49.9	50.1
Finland	2007	15.00	71.0	29.0
France	2007	161.10	65.0	35.0
Germany	2000	145.60	83.0	17.0
Hungary	2004	5.12	42.4	57.6
Iceland	2003	1.28	47.6	52.4
Ireland	2000	6.25	46.3	53.7
Japan	2006-07	202.29	94.2	5.8
Korea	2004	25.77	69.5	30.5
Mexico	2006	79.35	84.9	15.1
Netherlands	2006	69.47	40.1	59.9
New Zealand	2006-07	13.18	56.2	43.8
Norway	2008	19.12	70.7	29.3
Poland	2005	9.38	36.5	63.5
Portugal	2007	23.39	51.4	48.6
Slovak Republic	2005	2.91	43.3	56.7
Spain	2007	117.368	50.7	49.3
Sweden	2007	35.01	63.0	37.0
Switzerland	2005	14.70	60.5	39.5
United Kingdom	2000	134.20	81.9	18.1
United States	2007	689.07	86.2	13.8
Chile	2006	8.68	82.6	17.4
Estonia	2004	1.31	..	..
India	2003	14.40	49.2	50.8
Israel	2004	5.13	61.3	38.7
South Africa	2005	16.61	51.6	48.4

1. The conversion from national currency data to data in US dollars has been calculated using annual average exchange rates for the corresponding year.

Sources: Country data, OECD data processing.

StatLink  <http://dx.doi.org/10.1787/764451883340>

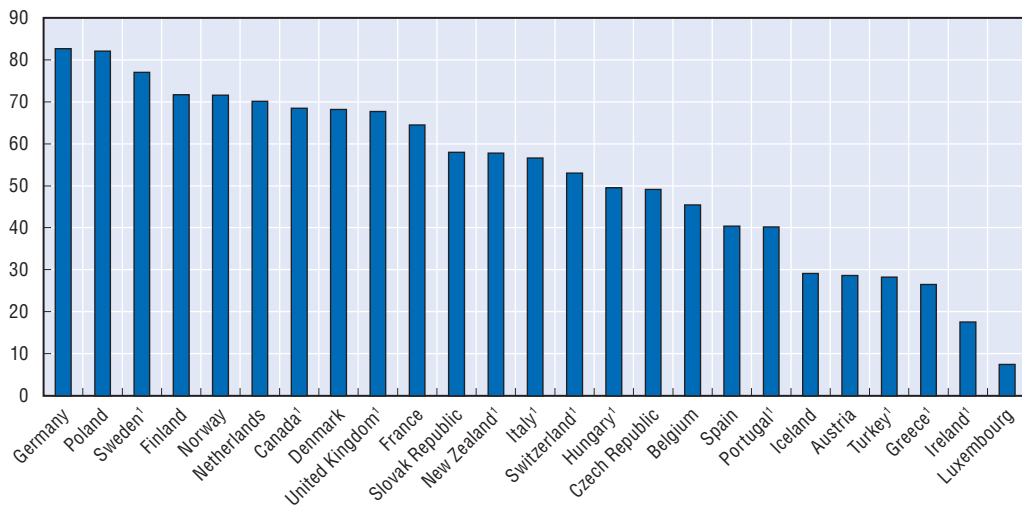
Box 1.3. Measuring domestic tourism

Several OECD countries have no detailed data available on tourism activity of resident visitors. Appropriately designed surveys are needed to measure tourism activity by residents. Such data can be collected as part of more general household consumption surveys, or through separate surveys. In any case, it is essential to be able to identify consumption within the territory (internal tourism) and outside the territory (outbound tourism). The growing utility of the Tourism Satellite Accounts (TSA) is now making it possible to gather data on domestic tourism for a great number of countries.

TSA data are not available for all OECD countries nor are they available in sufficiently long series to allow comparison between the dynamics of the two components of internal consumption. Data on overnight stays in commercial accommodation by residents and by non-residents have long been collected and these can provide an idea of the dynamics.


In many countries, residents rely heavily on non-commercial accommodation (with relatives, friends, or secondary homes), but they nevertheless constitute a substantial clientele of commercial establishments, and collective accommodation receives more residents than non-residents in several countries (Figure 1.1). In Germany and in Poland, residents account for around 80% of all nights spent in collective accommodation. By contrast, the countries where inbound tourism outweighs domestic tourism are either high-intensity tourism countries such as Austria, Greece, Turkey, Portugal and Spain or countries of small size, such as Luxembourg and Iceland.

Figure 1.1. Shares of nights spent in collective accommodation by residents, 2008
Percentages of nights spent by residents/nights spent by residents and non-residents



1. 2007 data.

Sources: Eurostat, World Tourism Organization.

StatLink  <http://dx.doi.org/10.1787/764055055062>

Domestic tourism appears to be less dynamic than inbound tourism; for example, over the period 2003-07, when tourism was recovering strongly from its trough in the early years of the decade, the average annual growth rate (for countries listed in Figure 1.1) in the number of overnight stays by residents was barely 1%, or two percentage points below the corresponding growth rate for inbound tourism.

International tourism is highly sensitive to external factors

International tourism is the main focus of attention even though it still constitutes only a modest fraction of the tourism industries as a whole, particularly in OECD countries. Nevertheless, it constitutes by far the most rapidly growing tourism segment, and is playing a large role in the globalisation process. OECD countries are now witnessing the emergence of new competitors. Chief among these new competitors are countries that are playing an ever more important role in the world economy: Brazil, China, India and the Russian Federation. These countries are experiencing strong growth in inbound and outbound

tourism alike, although this seems to be a result rather than a cause of economic growth. On the other hand, some smaller countries are looking primarily to tourism to drive their development.

The performance of international tourism is closely linked to that of the world economy

Over the last twenty years, international tourism, as measured by the number of tourist arrivals (Box 1.4), has mirrored the four downturns in the world economy, measured by global GDP, which occurred in 1991, 1998, 2001 and 2008 (Figure 1.2). The events of 11 September 2001 accentuated the fall in tourism at the end of that year. Tourism suffered another setback in 2003, despite accelerating world growth. Factors specific to tourism were reflected during this period, such as terrorist threats, the outbreak of the Iraq war, the Severe Acute Respiratory Syndrome (SARS) crisis and the spread of the avian flu in Asia and the Pacific. Yet the shocks that tourism experienced over the period had effects that were very short-lived and were rapidly absorbed. Overall, international tourism growth was far more robust than economic growth. For the period as a whole, the average annual growth rate in tourist arrivals was 4.6%, compared to 3.4% for global GDP.

Box 1.4. Indicators for measuring international tourism

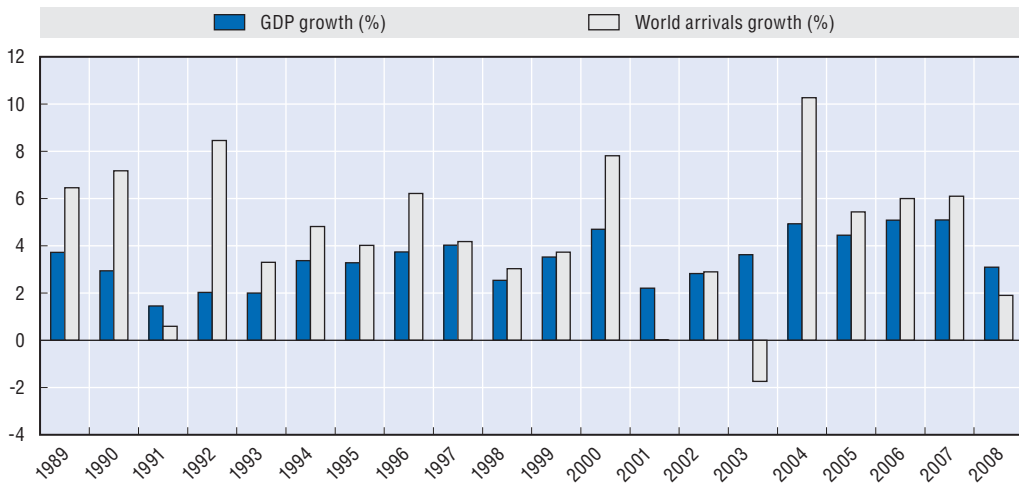
The analysis presented here on international tourism relies on two main indicators: tourist arrivals and tourism receipts. These indicators have the advantage of being available over a fairly long period of time, and almost continuously for most countries. They have some drawbacks, however, which must be borne in mind, with respect to arrivals of non-resident tourists:

- By definition, these do not include same-day visitors (or day excursionists).
- These usually correspond to border arrivals but for some countries they relate to arrivals in collective accommodation establishments, or in hotels alone.
- These do not take account of length of stay. Data on visitor nights would certainly be more useful, but they are unavailable for many countries. Thus, “pass-through” countries receive far more arrivals because of their geographic location. In practical terms, for countries that have both types of statistics, the number of arrivals generally rises faster than the number of visitor nights, because of the trend to shorter stays. On the other hand, expenditures per night tend to vary inversely with length of stay, if only because some travel expenses are essentially fixed and are unaffected by length of stay.
- Arrival statistics are very sensitive to the delineation of borders. For example, in the United States its arrival statistics do not include movements between different states, while in Europe the figures record movements between countries.

Data on receipts and expenditures are derived from an evaluation of the “travel” and “transportation passenger services” lines in the Balance of Payments. The “travel” line is available for most countries over a long period. For transportation passenger services, data are frequently unavailable.

The work that has been done in the context of the Tourism Satellite Accounts can provide a better understanding of the differences in levels and trends of these various indicators; however, they cover only short periods for many countries.

Figure 1.2. **World international tourist arrivals and GDP growth, 1989-08**



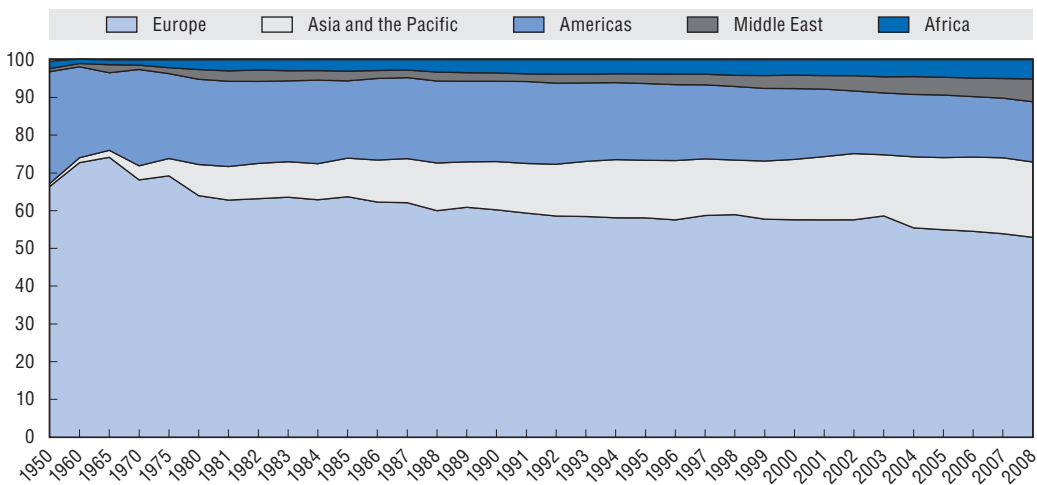
Sources: International Monetary Fund, World Tourism Organization.

StatLink <http://dx.doi.org/10.1787/764056713612>

World tourism is shifting to the South and the East

In the years following the Second World War (Figure 1.3), international tourism involved primarily Europe and North America. Since the 1970s, Asia-Pacific, Africa and the Middle East have taken a significant share of world tourism. Europe, however, still accounts for more than half, both in terms of international tourist arrivals and tourism receipts. For the last decade, Asia-Pacific has surpassed the Americas (North, Central and South America), accounting for about more than 20% of international tourism in terms of arrivals and receipts. The Americas rank third, with around 20% of revenues and only 16% of arrivals. Africa and the Middle East lag far behind, despite strong growth in their market shares, which now stand at around 5% in terms of arrivals and slightly less, between 3% and 4%, for the associated receipts.

Figure 1.3. **International tourism: Market share by region, 1950-08¹**



1. Measured in terms of tourist arrivals.

Source: World Tourism Organization.

StatLink <http://dx.doi.org/10.1787/764121267272>

OECD countries are losing market shares

Over the last 20 years, OECD countries as a whole have seen a decline in their share of international tourism and of the world economy. Growth in arrivals averaged only 2.8% versus 4.4% worldwide, and GDP growth was 2.4% versus 3.4% worldwide (Table 1.6).

In 2008, however, OECD countries still held a majority share of international tourism: 57% of arrivals and 67% of receipts (Box 1.5). Since 2000, the loss has been 10 percentage points for arrivals but only 5 percentage points for receipts. During the decade 1990-2000, the loss was around five percentage points both for arrivals and for receipts.

Box 1.5. Limitations of the market share concept for analysing the competitiveness of destinations

The usefulness of the market shares concept for analysing the competitiveness of destinations should not be overestimated by making it an overriding objective of tourism policy. This caution holds whether market share is measured by visitor arrivals or by tourism receipts, or indeed by other indicators. It is backed by at least two arguments:

- In the last few decades, competition on world tourism markets has become fiercer, with the rising clout of new destinations. Countries that have a long-standing tradition of receiving foreign tourists are unlikely to see their tourism industry grow as fast as those in countries that are just opening up to tourism. An analogy can be drawn here with product cycle theories.
- A tourism destination is not a “product” in the common sense. A measure of competitiveness must take into account many other dimensions beyond the economy, such as natural and cultural heritage, environment, infrastructure, rules and regulations, security, etc.

OECD countries are unevenly distributed among the broad geographic areas of global tourism: these account for 80% of European tourism, 60% of American hemisphere tourism, and only 12% of Asian tourism. In particular, there are few OECD countries in the fast-growing tourism areas.

In Europe, over the last two decades, tourism development has been relatively modest in western European countries, which continue however to receive the greatest numbers of tourists. It has been especially dynamic in the countries of central and eastern Europe, and has remained fairly strong in southern Europe and around the Mediterranean, and also in the countries of northern Europe.

In central and eastern Europe, the rapid expansion of inbound tourism began in the early 1990s after the fall of the Berlin wall. Growth remained fairly strong into the present decade, particularly in the Czech Republic and in the Slovak Republic. In Estonia, inbound tourism grew rapidly during the 1990s, but has tended to stagnate since 2000. In the Russian Federation, visitor arrivals have been rising at a modest pace during this decade.

The southern Europe and Mediterranean zone has traditionally attracted heavy tourism inflows. OECD countries account for the preponderant share, with around 85% of arrivals, but they are subject to heavy competition from North African countries and also from destinations such as Croatia and Slovenia. In Slovenia, inbound tourism has grown very quickly in the 1990s and since 2000. Despite this competition, the destinations traditionally most visited, such as Spain and Italy, have maintained their position with a growth rate of 3%

Table 1.6. **International tourist arrivals, 1990-2008**

Type of indicator ¹	Average annual growth					2008 million	
	1995/1990	2000/1995	2003/2000	2007/2003	2007/1990		
	%	%	%	%	%		
Austria	TCE	-2.0	0.9	2.0	2.1	0.5	21.9
Belgium	TCE	..	3.0	1.2	1.3	2.0 ²	7.1
Czech Republic	TCE	..	7.1	2.7	7.3	5.8 ²	6.6
Denmark	TCE	..	..	-0.6	7.9	4.1 ³	4.7 ⁴
Finland	TF	..	8.8	-1.4	7.8	5.8 ²	3.6
France	TF	2.7	5.2	-0.9	2.2	2.7	79.3
Germany	TCE	-2.7	5.1	-1.1	7.3	2.1	24.9
Greece	TF	2.7	5.3	2.2	5.8	4.1	17.5 ⁴
Hungary	TF	..	..	..	..	..	8.8
Iceland	TCE	6.0	27.3	6.7	8.1	12.5	1.1
Ireland	TF	5.6	6.6	0.6	5.4	4.9	8.0
Italy	TF	3.1	5.8	-1.3	2.5	2.9	42.7
Luxembourg	TCE	-1.3	2.1	0.6	1.4	0.7	0.9 ⁴
Netherlands	TCE	2.6	8.8	-2.8	4.6	3.8	10.1
Norway	TF	8.1	1.5	1.7	7.0	4.7	4.4
Poland	TF	..	-2.0	-7.6	2.2	-2.1 ²	13.0
Portugal	TF	3.5	4.9	-1.1	1.3	2.6	12.3 ⁴
Slovak Republic	TCE	1.9	3.1	9.2	5.3	4.3	1.8
Spain	TF	0.5	6.5	2.0	3.9	3.3	57.3
Sweden	TCE	..	10.6	3.7	5.2	7.0 ²	5.2 ⁴
Switzerland	THS	-2.7	2.4	-5.9	6.6	0.3	8.6
Turkey	TF	8.1	6.2	11.6	13.6	9.4	25.0
United Kingdom	TF	5.0	1.3	2.1	5.7	3.6	30.2
Total Europe		1.9	4.5	0.1	5.5	3.4	403.0
Canada	TF	2.2	3.0	-3.7	0.6	1.0	17.1
Mexico	TF	3.3	0.4	-3.3	3.5	1.3	22.6
United States	TF	2.0	3.4	-7.0	8.0	2.1	58.0
Total America		2.4	2.6	-5.4	5.3	1.7	97.7
Japan	VF	0.7	7.3	3.1	12.5	5.7	8.4
Korea	VF	4.9	7.2	-3.7	7.9	4.7	6.9
Australia	VF	11.0	4.0	-1.3	4.4	5.1	5.6
New Zealand	VF	7.6	4.9	5.6	4.0	5.6	2.5
Total Asia-Oceania		5.4	6.0	0.1	6.4	5.3	23.4
Total OECD		2.1	4.1	-1.0	4.8	2.8	524.1
Brazil	TF	12.8	21.7	-8.0	5.0	9.4	5.1
Chile	TF	10.3	2.5	-2.5	11.6	5.9	2.7
China	TF	13.8	9.3	1.8	13.5	10.2	53.0
Egypt	TF	3.6	12.2	3.9	13.0	9.1	12.3
Estonia	TF	..	18.1	6.2	6.8	11.2 ²	1.9 ⁴
India	TF	4.5	4.5	1.0	16.7	6.6	5.4
Indonesia	TF	14.7	3.2	-4.1	5.4	5.6	6.2
Israel	TF	15.8	1.8	-24.0	18.1	4.0	2.6
Romania	TCE	-11.8	2.5	8.4	7.0	0.5	1.5
Russian Federation	TF	..	..	2.1	0.4	..	22.9 ⁴
Slovenia	TCE	..	8.3	8.0	6.3	7.5 ²	1.8
South Africa	TF	..	5.5	4.2	6.5	6.1 ²	9.6
Total World		4.2	4.9	0.5	6.9	4.4	922.0


1. TCE: International tourist arrivals at collective tourism establishments.
TF: International tourist arrivals at frontiers (data exclude same-day visitors).
VF: International visitor arrivals at frontiers (data include same-day visitors).
THS: International tourist arrivals at hotels and similar establishments.

2. 2007/1995.

3. 2007/2000.

4. 2007 data.

Sources: World Tourism Organization, OECD data processing.

StatLink  <http://dx.doi.org/10.1787/764453667546>

a year, or slightly even more for Spain. Tourism growth rates in Turkey and Greece have exceeded the OECD average.

There are many OECD members in western and northern Europe. Inbound tourism growth has generally been more dynamic in northern countries, such as Iceland, Sweden, Finland, Ireland and Denmark. While significant, inbound tourism growth has been somewhat weaker in the Netherlands, the United Kingdom and France. Germany has seen particularly strong growth since 2003.

On the American continent, the OECD countries (Canada, Mexico and the United States) should be distinguished from the other areas (South America, the Caribbean and Central America). For the OECD countries, inbound tourism has been growing slowly in the last two decades. The setbacks observed from 2000 to 2003 were absorbed fairly promptly after 2004, especially in the United States, where the depreciation of the dollar against the euro has attracted visitors from across the Atlantic. In South and Central America and in the Caribbean, while the volume of international tourism is still far short of that in North America, growth rates have been much higher for at least 20 years. That growth has been especially strong in Central America, and in particular for the three countries that receive the most tourists: Costa Rica, Guatemala and El Salvador. It was slightly slower but still strong in South America, particularly in Brazil, Argentina, Chile and Peru.

International tourism in Asia-Pacific has been booming, and China is now one of the most popular destinations in the world. Since 1990, tourist arrivals in China have increased by a factor of five and more. For the two OECD countries in Asia – Japan and Korea – inbound tourism growth has also outpaced the world average. Increases in tourist arrivals in those two countries were particularly strong between 2003 and 2007.

Australia and New Zealand are the two main destinations in Oceania. Since 2003, their inbound tourism growth rate has matched or has slightly been under the world average.

Trends in tourism expenditure and receipts

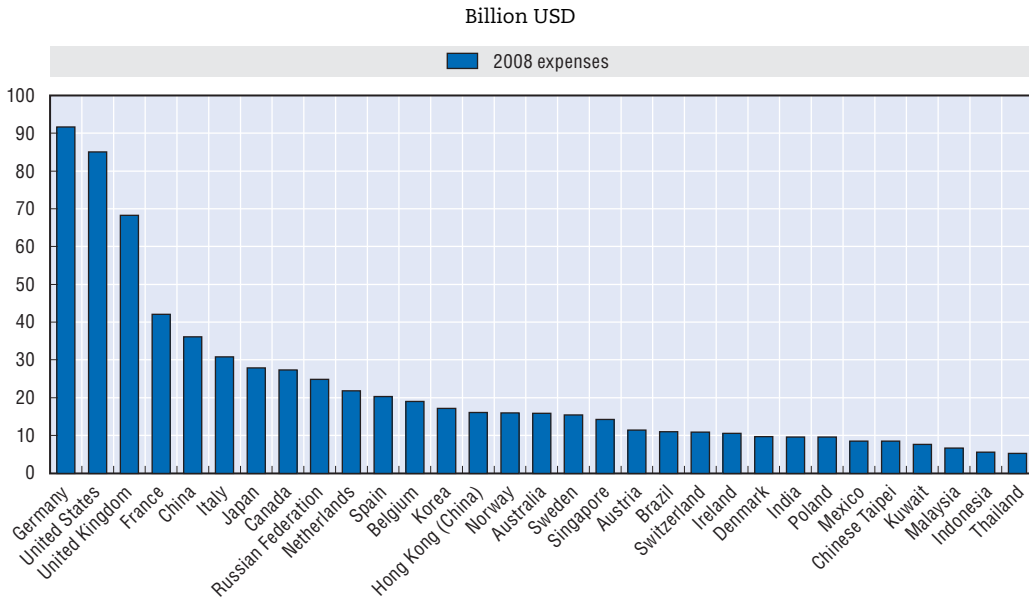
In estimating each country's tourism expenditure and receipts, this section uses credit and debit data from the "travel" and "transportation passenger services" items of the Balance of Payments.²

OECD countries are leading receiving and spending countries. The OECD is both a large destination and a large origin area for international tourists. In a list of countries ranked by descending order of international tourism expenditures, only six of the top-spending 25 countries or territories do not belong to the OECD (Figure 1.4): China, the Russian Federation, Hong Kong (China), Singapore, Brazil and India. The four biggest countries of origin are OECD countries: Germany, the United States, the United Kingdom, and France. These four alone account for around 43% of the 25 countries' expenditures.

With respect to receipts from international tourism, the same countries figure with a slightly different ranking (Figure 1.5). Germany, for example, is in sixth place, while Spain moved up to second place. Austria also advanced several notches. Turkey and Greece join the 25 countries receiving the most receipts. The first five places are occupied by OECD countries: the United States, Spain, France, Italy, and the United Kingdom, and together they represent 50% of receipts for the 25 countries.

There are eight OECD non-member economies in this ranking: China, Thailand, Hong Kong (China), Malaysia, Macao, the Russian Federation, Croatia and Egypt.

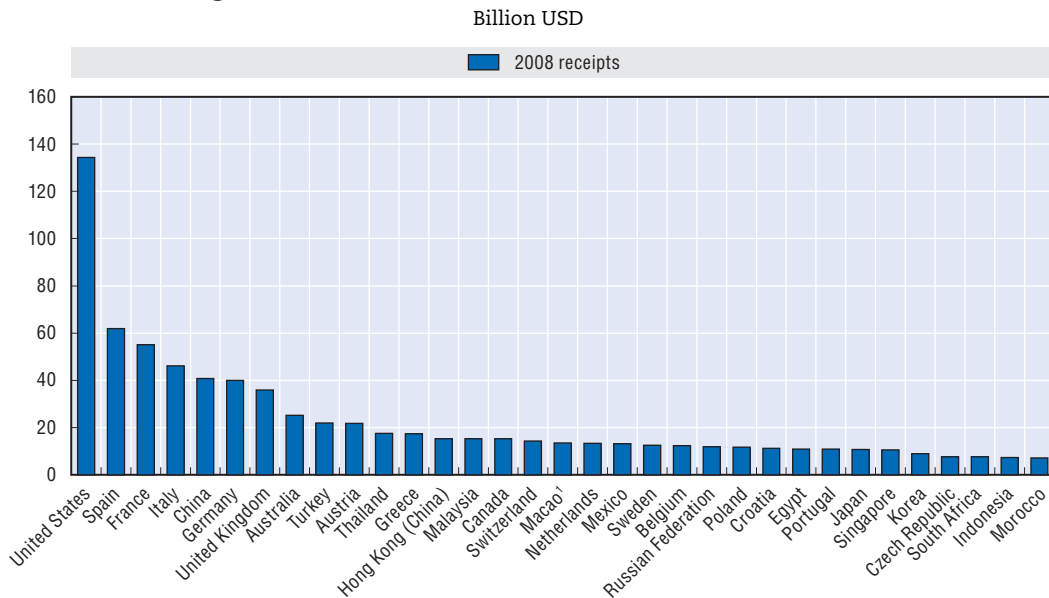
Figure 1.4. **Main countries for outbound tourism, 2008**



Sources: Balance of Payments (travel item), IMF, OECD data processing.

StatLink <http://dx.doi.org/10.1787/764147180135>

Figure 1.5. **Main countries for inbound tourism 2008**



1. 2007 data.

Sources: Balance of Payments (travel item), IMF, OECD data processing.

StatLink <http://dx.doi.org/10.1787/764164064234>

The OECD balance of travel expenditures and receipts. Overall, the OECD area appears to be in rough balance as regards international tourism, in the sense that its outbound tourism expenditures are roughly equivalent to its inbound tourism receipts. The difference between expenditures and receipts can be considered (if statistical discrepancies are not taken into account) as the balance of extra-OECD tourism, it has been less than 0.1% of the GDP for the

whole period surveyed. In 2008, receipts amounted to USD 631 billion or around 67% of world tourism receipts.³ This was well below the figures for the early 1990s, when OECD receipts accounted for about 80% of the total. On the expenditure side, the figure was USD 594 billion in 2008. The statistical gap between total world receipts and total world expenditures shows a tendency to overestimate receipts *vis-à-vis* expenditures, and suggests that the apparent OECD surplus of receipts over expenditures is in fact a deficit.

This situation holds true for tourism in the OECD area as a whole. For individual countries, receipts and expenditures are generally much more skewed. As a general rule, the northern countries have been net senders while the southern countries tend to be net receivers, a pattern that has been very stable over the period of study (Table 1.7). More specifically, three situations can be distinguished:

- Countries in balance: this category applies to countries where the net tourism balance falls between -1 and +1 percentage points of GDP.
- Net receiving countries: their revenues from non-resident visitors exceed by a wide margin the expenditures that their residents make when travelling abroad.
- Net sending countries: their residents' expenditures abroad exceed by a wide margin the receipts derived from non-resident visitors.

Every country's classification in the above breakdown has remained fairly stable since the 1990s. The countries that are clearly net receivers are Greece, Portugal, Spain, Turkey, Austria, New Zealand, the Czech Republic and Hungary. These countries were already in this category in 1995. Greece and Spain, two countries with strongly growing inbound tourism, demonstrated differing trends for outbound tourism, which has developed much more quickly in Spain than in Greece. The countries that are clearly net senders include Iceland, Norway, Korea, Belgium, Germany, the United Kingdom and Ireland. Only the latter two countries were absent from this category in 1995. For its part, Germany has reduced its deficit as a percentage of GDP since 1995. Similarly, Japan, Sweden and the Netherlands, which were net senders in 1995, have managed to bring their tourism accounts much closer to balance by boosting their inbound tourism sharply.

The OECD area and international passenger transportation. International passenger transportation, of which air transport constitutes the bulk, is a significant component of tourism receipts and expenditure. For the OECD area as a whole, the amounts involved in the international transportation of passengers amounted in 2008⁴ to around USD 115 billion, or 20% of the amounts recorded in the "travel" line (Figure 1.6). There are great variations in this ratio from one country to another, and also between receipts and expenditure, but it recorded an overall increase of about one percentage point between 2003 and 2007, on both the receipts and the expenditure side.

The slight deficit for the OECD as a whole reflects, in fact, a very clear divide between countries with large deficits and others with large surpluses:

- Japan, the United Kingdom, Canada, the United States and Italy, in decreasing order, have significant deficits.
- By contrast, the Netherlands, Spain, Ireland, Turkey, France, Portugal and Australia generate strong surpluses. It is a particular feature of the Netherlands and Turkey, moreover, that their expenditures are a miniscule proportion of their receipts.

Table 1.7. **Travel balance: Receipts and expenditure, 1990-08**

Percentage of GDP at current prices

	1990	1995	2000	2003	2007	2008
Australia	0.0	0.8	0.7	0.9	0.9	0.9
Austria	3.4	1.1	1.9	1.9	2.2	2.5
Belgium	..	-1.3	-1.3	-1.3	-1.4	-1.3
Canada	-0.8	-0.4	-0.2	-0.3	-0.6	-0.8
Czech Republic	..	2.2	3.0	1.8	1.6	1.4
Denmark	-0.3	-0.3	-0.6	-0.7	-0.8	-0.9
Finland	-1.1	-0.5	-0.4	-0.3	-0.5	-0.5
France	0.6	0.7	1.0	0.7	0.7	0.5
Germany	-1.4	-1.7	-1.8	-1.7	-1.4	-1.4
Greece	1.6	2.1	3.7	4.3	3.9	3.8
Hungary	1.0	3.1	4.3	1.7	1.3	1.3
Iceland	-2.1	-1.4	-2.8	-1.9	-3.8	-3.1
Ireland	0.6	0.3	0.1	-0.6	-1.0	-1.5
Italy	0.5	1.2	1.1	0.7	0.7	0.7
Japan	..	-0.6	-0.6	-0.5	-0.4	-0.4
Korea	0.1	-0.2	-0.1	-0.8	-1.4	-0.9
Luxembourg	..	2.4	1.9	2.0	1.0	1.1
Mexico	0.0	1.0	0.4	0.4	0.4	0.4
Netherlands	-1.1	-1.2	-1.3	-1.1	-0.7	-1.0
New Zealand	0.2	1.7	1.6	3.1	-0.4	1.6
Norway	-1.8	-1.3	-1.5	-1.9	-2.5	-2.5
Poland	-0.1	1.4	1.4	0.5	0.7	0.4
Portugal	3.6	2.4	2.7	2.7	2.8	2.7
Slovak Republic	..	1.5	0.7	0.9	0.7	0.5
Spain	2.8	3.5	4.1	3.5	2.6	2.6
Sweden	-1.4	-0.8	-1.6	-1.0	-0.4	-0.6
Switzerland	0.6	0.6	0.5	0.5	0.4	0.7
Turkey	1.3	1.8	2.2	3.7	2.3	2.5
United Kingdom	-0.3	-0.4	-1.1	-1.4	-1.2	-1.2
United States	0.2	0.4	0.3	0.2	0.3	0.3
OECD average	0	0	0	0	0	0.1
Brazil	0.0	-0.3	-0.3	0.0	-0.2	-0.3
Chile	..	0.3	0.3	0.0	-0.1	0.2
China	0.3	0.7	0.3	0.1	0.2	0.1
Egypt	..	2.3	3.3	3.9	5.1	6.0 ¹
Estonia	..	7.1	5.4	3.6	1.7	1.8
India	0.4	0.4	0.2	0.1	0.0	0.2
Indonesia	1.0	1.4	1.1	0.4	0.1	0.3
Israel	-0.1	0.9	1.1	-0.4	-0.1	0.1
Romania	..	-0.3	-0.2	-0.1	0.0	-0.1
Russian Federation	..	-2.3	-2.1	-1.9	-0.9	-0.9
Slovenia	..	..	..	2.0	2.4	3.3
South Africa	0.6	0.2	0.4	1.6	1.6	1.2

1. Estimate.

Sources: Balance of Payments (travel item), IMF, National Accounts, OECD data processing.


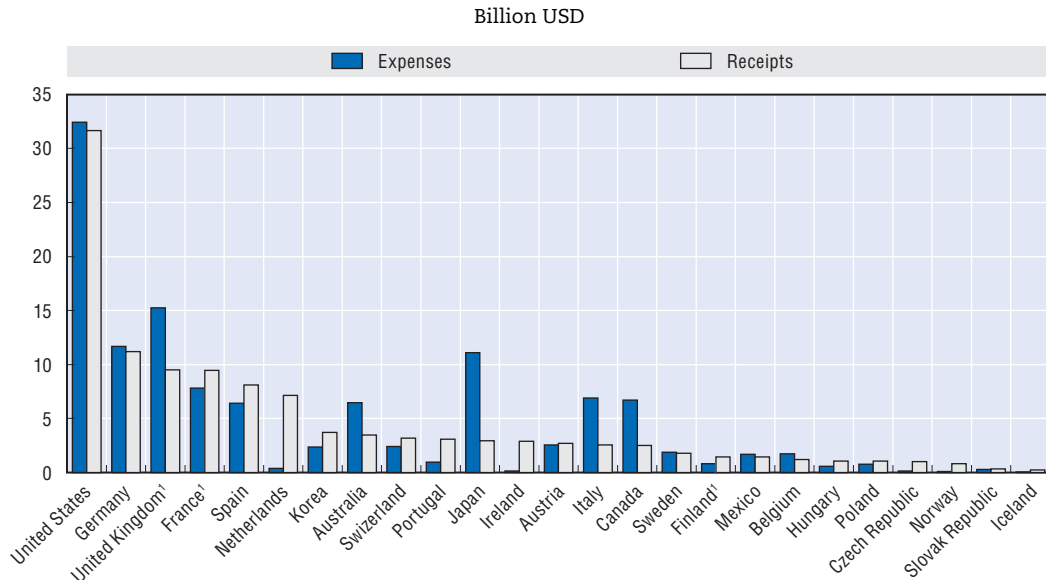
StatLink  <http://dx.doi.org/10.1787/764482624277>

Figure 1.6. **International passenger transport receipts and expenditure, 2008**

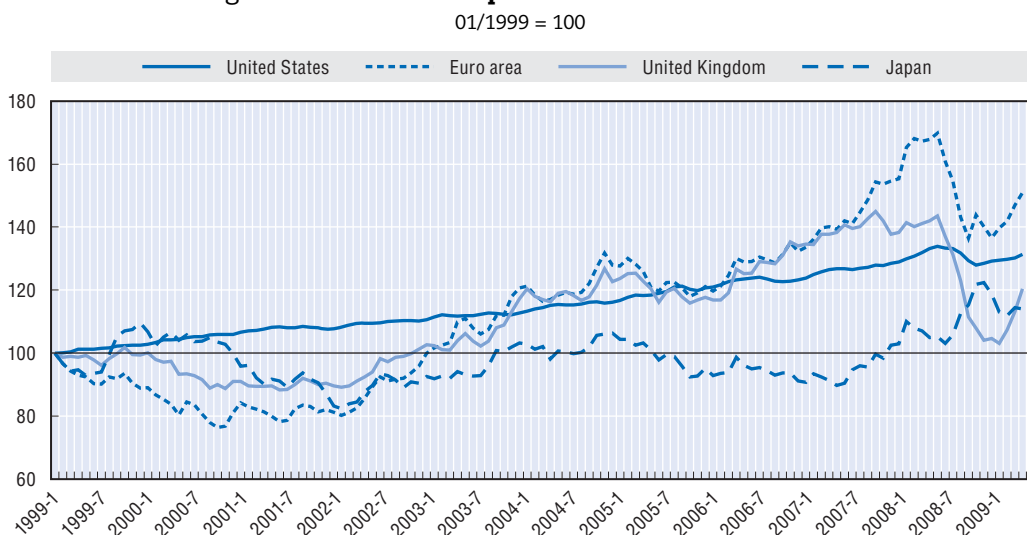
1. 2007 data.

Sources: Balance of Payments (passenger transport item), IMF, OECD data processing.

StatLink <http://dx.doi.org/10.1787/764174644121>

Tourism flows are impacted by exchange rate movements

Prices are one of the essential elements in a country's tourism competitiveness. When it comes to international tourism, however, prices must be viewed in light of shifting exchange rates. In fact, exchange rate movements can fluctuate much more widely than relative prices quoted in national currencies. Over the last 10 years, there have been particularly sharp exchange rate movements among OECD countries. This point can be illustrated by considering the relative shifts in the four world benchmark currencies – the US dollar, the

Figure 1.7. **Consumer price indexes in US dollars**

Source: OECD databases.

StatLink <http://dx.doi.org/10.1787/764211327143>

euro, the pound sterling and the yen (Figure 1.7). These four currencies in fact cover 16 OECD countries, as the euro embraces 13 countries that are members of the Organisation.⁵

This analysis takes as its starting point the beginning of 1999, when the euro was introduced. In the absence of an appropriate generalised Tourism Price Index, Consumer Price Indexes transformed in US dollars have been used to calculate a competitiveness indicator. Since the starting point, the euro area has seen broad swings. This interval can be divided into two sub-periods: during the first, between 1999 and 2003, the euro area experienced price competitiveness gains *vis-à-vis* the dollar zone, but in the second, between 2003 and 2008, it lost ground. The period of gains began in 1999 and peaked in June 2001 (a differential of -28%). That gain remained steady for just under a year, until the spring of 2002, and then declined for a year until it was wiped out in June 2003. Since the end of 2003, competitiveness losses in the euro area have persisted, accelerating as of spring 2005 and culminating at a differential of +28% in April 2008, when the euro traded at USD 1.57. Thereafter, in barely more than six months to November 2008, the differential virtually vanished, shrinking by 23 percentage points. It rebounded by approximately 10 points in the first half of 2009.

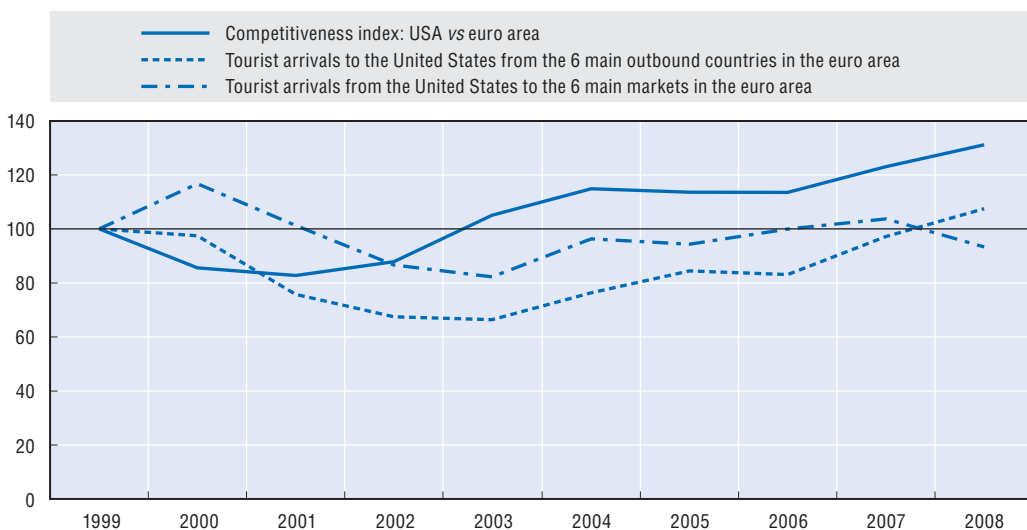
Figure 1.8 provides annual data for tourism between the United States and the euro area, it demonstrates a certain linkage between shifting competitiveness and tourism flows. However, the events of 11 September 2001 also had a major impact on these profiles.

From 1999 to 2003, tourist arrivals in the United States from the six largest euro area markets fell by 33%, and it took five years for them to reach and then exceed their 1999 levels. The dollar's fall against the euro certainly facilitated this shift. On the other hand, visits by US residents to euro area countries were particularly strong in 2000, sparked by the millennium festivities. These visits then dropped sharply until 2003, and although resumed an upward trend in the following years, are still far short of the 2000 record.

The pound sterling's swings against the dollar have roughly paralleled those of the euro, but with lesser amplitude. Thus, from 2000 until 2003 the United Kingdom saw its price competitiveness *vis-à-vis* the United States improve, while it declined against the euro area.

Figure 1.8. **Competitiveness indicators and tourism: USA and euro area**

Year 1999 = 100



Sources: OECD databases, Office of Travel and Tourism Industries (United States).

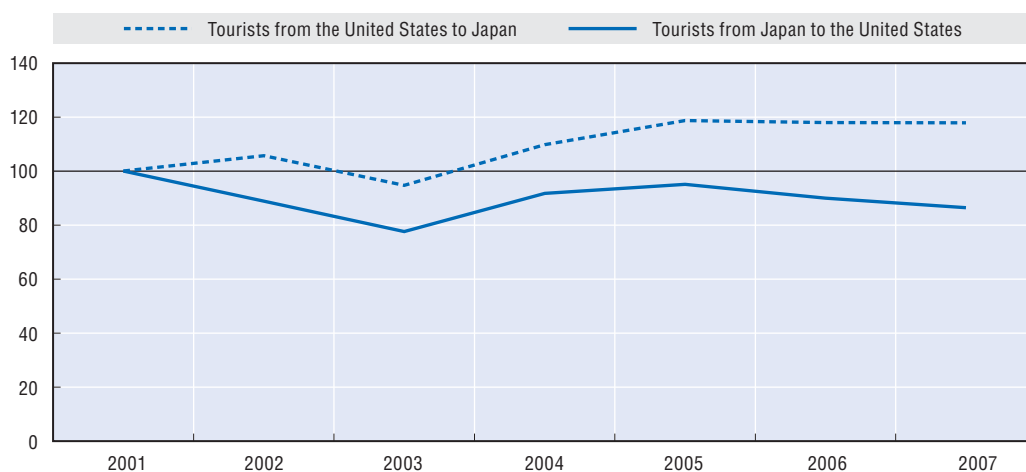
StatLink  <http://dx.doi.org/10.1787/764284425733>

From 2004 on, the UK situation became more synchronised with that of the euro area, but in the autumn of 2007 the pound diverged from the euro, which has since risen sharply against the dollar. At the present time, the United Kingdom has greatly enhanced its price attractiveness for countries in the euro area.

There have been very wide movements of the Japanese yen against the dollar over the last 10 years. The change in Japanese prices expressed in dollars since 1999 has been consistently less than that in US prices, which may be taken as a benchmark. The gap peaked in 2007 at -30%, but has since tended to narrow – it was only -10% at the end of 2008. Japan's price-competitiveness gains have no doubt been a factor in the sharp growth in foreign tourist arrivals recorded between 2004 and 2007. Over that entire period, the number of US tourists visiting Japan rose significantly, while Japanese tourist visits to the USA tended downward (Figure 1.9). The fact remains that the number of Japanese tourists visiting the United States is still four times the number of US tourists visiting Japan (3.5 million *versus* 850 000).

Figure 1.9. **Changes in tourism flows between Japan and the United States**

Year 2001 = 100



Source: Japan National Tourist Organization.

StatLink  <http://dx.doi.org/10.1787/764337346158>

Share of air travel is growing

The distribution of non-resident visitor arrivals among modes of transport varies greatly among OECD countries, notably for geographic reasons. On average, however, road and air are by far the most utilised modes. Rail and water transportation (including inland waterways) lag far behind, except for a few countries (Table 1.8).

Recent years have seen much stiffer competition in air travel, with heavy incursions by low-cost airlines. A cheaper and more diversified supply has met a growing demand for medium and long range travels. Air travel has thus gained market share from other modes, in particular road transport. This is true for many European countries, for Canada and for Mexico. The growing share of air travel is especially marked for Portugal, Italy, Norway, Ireland, France and the United Kingdom. This growth has come mainly at the expense of road travel and, in Norway, Ireland and the United Kingdom, of transport by sea, which for these three countries remains an important mode of travel.


Table 1.8. **International tourist arrivals by means of transport used, 2003-07**

	Percentages							
	Air		Rail		Road		Sea	
	2003	2007	2003	2007	2003	2007	2003	2007
Australia	99.7	99.5	0.0	0.0	0.0	0.0	0.3	0.5
Canada	36.5	43.6	0.6	0.6	59.3	51.2	3.6	4.6
Finland	34.8	35.7	1.5	1.9	35.3	32.8	28.4	29.5
France	19.8 ¹	25.0	6.0 ¹	5.9	63.8 ¹	59.5	10.4 ¹	9.6
Greece	70.5	64.0	0.6	0.5	19.1	23.2	9.8	12.3
Hungary	4.8	5.3	4.3	3.6	90.2	90.5	0.7	0.7
Iceland	88.8	86.6	0.0	0.0	0.0	0.0	11.2	13.4
Ireland	71.2	78.8 ²	0.0	0.0	10.5	9.2 ²	18.3	13.0 ²
Italy	19.1	33.1	4.1	2.7	72.1	61.9	4.7	2.3
Japan	94.8	92.7	0.0	0.0	0.0	0.0	5.2	7.3
Korea	91.8	83.1 ²	0.0	0.0	0.0	0.0	8.2	16.9 ²
Mexico	41.2	49.8	0.0	0.0	58.8	50.2	0.0	0.0
New Zealand	99.0	99.0	0.0	0.0	0.0	0.0	1.0	1.0
Norway	35.8	44.1	2.4	2.3	40.4	34.8	21.4	18.8
Poland	2.3	4.4	3.6	2.8	91.0	92.3	3.1	0.6
Portugal	18.7	31.4	0.3	..	79.8	68.6	1.2	..
Slovak Republic	0.1	0.1	0.5	0.4	99.4	99.5	0.0	0.0
Spain	72.6	74.9	0.6	0.4	23.8	22.1	3.0	2.6
Turkey	71.9	72.0	0.4	0.3	20.6	20.2	7.1	7.5
United Kingdom	71.4	76.5	11.0	9.9	..	..	17.7	13.6
United States	56.0	54.2	0.0	0.0	43.1	44.9	0.9	0.9
Total OECD	45.5	46.9	2.1	2.2	48.4	46.9	4.1	4.0

1. 2004 data.

2. 2006 data.

Source: World Tourism Organization.

StatLink  <http://dx.doi.org/10.1787/764538588770>

In some countries, however, air travel has been losing market share. In Greece, for example, road and sea transport are gaining share, while in Korea and Japan sea transport seems to be making progress.

Leisure and vacation travel dominates

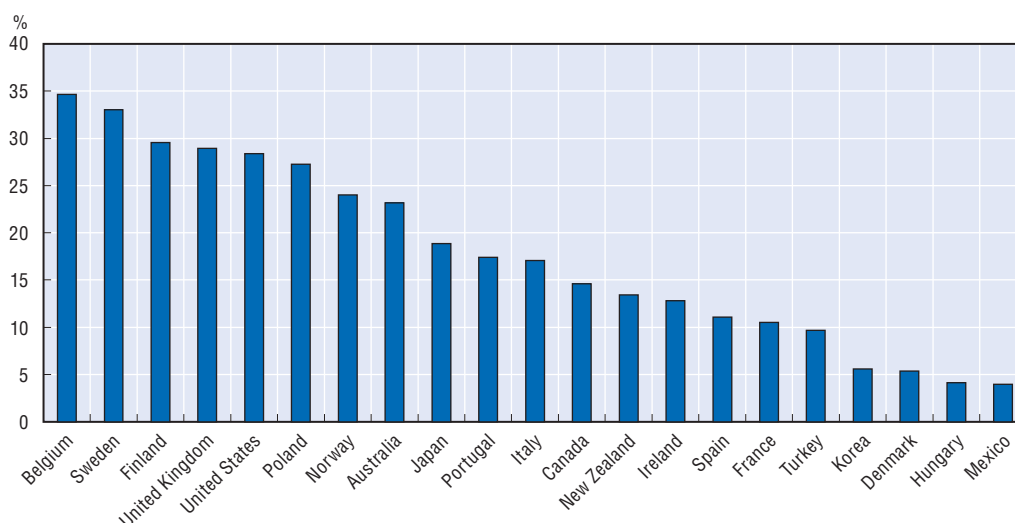
The purposes of a tourism trip are conventionally classified under broad categories which distinguish personal from business and professional purposes. Within personal purposes, different categories are identified such as purposes of holidays, leisure and recreation, visits to friends and relatives. Other categories include religious journeys such as pilgrimages, travel for medical treatment, etc.

For international trips to OECD countries,⁶ leisure is by far the most important purpose (> 50% of arrivals). The residual category comes next, at around 30%, while business travellers represent just over 15% of the total.

This distribution is roughly the same, on average, for OECD and non-OECD countries. The business-leisure split has been stable over time. The rise in international business travel induced by economic globalisation has been accompanied by a similar increase in other types of travel, particularly for leisure.

The differences arise primarily between countries (Figure 1.10), for example, business trips represent around a third of arrivals in Belgium and Sweden, but only 4% in Mexico and Hungary.

Figure 1.10. **Business travel shares, 2007**¹
Percentage



1. Measured in terms of arrivals.

Source: World Tourism Organization.

StatLink  <http://dx.doi.org/10.1787/764347400282>

Tendency towards shorter stays

In developed countries, the shrinking duration of tourist trips in collective accommodation establishments is closely linked to changing lifestyles and developments in the means of transport. There are clear differences, however, among countries as to the predominance of short or long stays⁷ (Table 1.9).

For non-residents, there is a clear distinction between what might be called “stay” countries and “pass-through” countries. The first category refers to countries where the length of stay exceeds three days, and these include more than half of the 26 OECD countries for which data are available. A comparison of data for 2003 and 2007 shows a declining length of stay in 18 of the 21 countries for which comparative data for the two years are available. The cut in average stay was particularly pronounced in France and in Poland.

For residents, the average length of stay in collective accommodation is less often available than for non-residents. When it is available, it is most often shorter than for non-residents, particularly in the “stay” countries. Only in France does the average stay exceed three days by a significant margin; generally speaking, it has been declining since 2003 for residents as well as for non-residents.

Online reservations continue to rise

The use of Internet for tourism purposes has been constantly increasing in the last years, as shown by a survey carried out by the European Commission (Table 1.10). In terms of use of Internet by travellers, more than 25% of individuals surveyed in Norway, Iceland, Finland, Denmark, and Sweden, as well as in Canada, Luxembourg and the Netherlands have booked travel or accommodation on the Internet.

Table 1.9. **Average length of stay in collective accommodation, 2007**

	Non-residents		Residents	
	2007 Days	2007/2003 variation Days	2007 Days	2007/2003 variation Days
Austria	4.3	-0.23	3.2	-0.3
Belgium	2.31	..	2.68	..
Czech Republic	3.09	-0.17	3.22	-0.42
Denmark	5	..	2	..
Finland	2.16	0.04	1.8	-0.02
France	6.1	-1.46	4.8	-0.41
Germany	2.2	-0.1	2.9	-0.3
Greece	5.37	-0.6	2.45	-0.01
Hungary	2.95	-0.46	2.48	-0.07
Iceland	1.8	0	1.6	0.1
Ireland	7.6	..	3.3	..
Italy	3.81	-0.18	3.26	-0.14
Japan	6.5	-2	..	..
Korea	6.8	..	..	..
Luxembourg	2.6	-0.3	3.2	-1.6
Mexico	9.92	-0.4	..	..
Netherlands	2.54	-0.26	3.13	-0.41
Poland	2.9	-1.2	1.95	0.06
Portugal	3.8	-0.8	2.05	-0.2
Slovak Republic	3.1	-0.5	3.04	-0.56
Spain	5.11	0.09	2.7	0.11
Sweden	2.14	-0.14	2.08	-0.15
Switzerland	2.48	..	2.15	..
Turkey	3.82	-0.72	1.85	-0.08
United Kingdom	7.7	-0.5	..	..
United States	1.6	-0.1	..	..

Source: World Tourism Organization.

StatLink  <http://dx.doi.org/10.1787/764546401043>Table 1.10. **Use of Internet for online tourism reservations**


Percentage of individuals who ordered travel and holiday accommodation on Internet

	2002	2003	2004	2005	2006	2007	2008
Austria	1	3	3	3	7	8	11
Belgium	..	..	..	..	7	8	8
Canada	..	..	..	36	..	..	..
Czech Republic	..	1	1	1	3	4	3
Denmark	8	10	14	18	26	27	30
Finland	2	3	7	10	12	26	31
France	..	..	..	..	8	14	18
Germany	3	5	6	10	21	23	22
Greece	0	0	0	0	1	2	2
Hungary	..	..	..	2	2	3	3
Iceland	..	14	24	31	39	40	38
Ireland	..	3	7	10	18	20	21
Italy	..	..	..	2	3	3	4
Luxembourg	5	9	19	17	21	24	27
Netherlands	5	6	2	15	21	25	26
Norway	..	13	25	33	40	41	45
Poland	..	..	0	1	1	..	2
Portugal	0	..	1	1	2	3	4
Romania	..	..	..	..	0	0	1

Table 1.10. **Use of Internet for online tourism reservations** (cont.)
Percentage of individuals who ordered travel and holiday accommodation on Internet

	2002	2003	2004	2005	2006	2007	2008
Slovak Republic	..	..	2	2	3	3	4
Spain	..	2	2	5	9	11	12
Sweden	8	12	..	16	18	28	27
Turkey	..	..	0	0	..	..	..
United Kingdom	11	17	18	24	23	24	27
Estonia	..	..	..	2	1	3	3
Slovenia	..	..	2	..	3	3	5

Source: Eurostat.

StatLink  <http://dx.doi.org/10.1787/764603555117>

Tourism enterprises

The globalisation of tourism and the resulting increase in competition and the changing patterns of the demand (see Chapter 2) are pushing OECD tourism enterprises to adapt, especially in those countries that have traditionally received the greatest tourism inflows. Their efforts have sparked some significant changes in the factors of production, i.e. labour and capital.

SMEs play an important role

The tourism industry is dominated by small- and medium-sized enterprises (SMEs).⁸ In the hotel, restaurant and travel agencies sectors, SMEs are responsible for at least 60% of employment in nearly all OECD countries for which data on enterprises by size are available. The only exception is the travel agency business in the United Kingdom, where large enterprises account for the majority of jobs (annex). In general, the relative weight of SMEs is somewhat less when measured in terms of turnover rather than employment, but the situation is less clear when it comes to investment.

In the hotel industry, the distribution by firm size varies appreciably among countries, particularly in terms of the relative importance of “family” hotels. In Korea, Greece, Italy, Poland, France and Austria there are many small hotels employing fewer than 10 persons. In these countries, this category represents more than a third of all hotel employment, and more than half in the case of Korea and Greece.

By contrast, larger enterprises dominate the accommodation landscape in another group of countries. Employment is more or less evenly divided between two classes of establishments: those with 50 to 249 persons employed and those with 250 or more. “Intermediate-sized” enterprises (50 to 249 persons engaged) often account for a large portion of employment, as in Ireland, Denmark, Norway, Portugal, Spain and the Czech Republic. In Spain, and to an even greater extent in the United Kingdom, a significant portion of employment depends on larger firms employing more than 250 people.

In many countries, the restaurant industry is largely in the hands of very small firms with fewer than 10 persons employed. The employment share of large firms (those with more than 250 persons engaged) is most often very low, below 15%, the only exceptions being Finland (25%) and, especially, the United Kingdom (nearly 38%).

Travel agencies present a varying picture from country to country. In the United Kingdom, Finland, Belgium, Spain, Sweden and France, the system is mixed, and a strong

nucleus of large firms co-exists with many small-scale enterprises. In other countries for which information is available, SMEs outweigh the small core of large firms. Italy is the clearest example of this configuration where very small enterprises (fewer than ten persons employed) represent more than 50% of total employment. The picture is similar, but somewhat less accentuated, in Norway.

Hotel capacity and other collective accommodation

Hotels play a central role in tourism, even if they are not always the most popular form of accommodation. In effect, they generally attract customers with relatively high purchasing power, in particular business travellers. Hotels are facing stiffer competition on two fronts:

- International competition, in terms of clients' choice of destination.
- Competition from other forms of accommodation.

Generally speaking, hotel capacity has been increasing only slowly in OECD countries over the last decade (Table 1.11). Efforts have focused, instead, on modernising hotels and running them more efficiently. One indication of this can be seen in the consistently very high rate of investment in the hotel sector in many countries. One may point to such developments as Internet reservations or the practice of "yield management", which allows hotel occupancy to be increased during low season. There are also other changes in play, for example, the rise of hotel chains at the expense of more traditional independent hotels. The size standard of these chain hotels exceeds that of independent hotels, and this is clearly one of the factors driving the trend to larger-scale hotels in many countries. According to Eurostat (2008), establishment size measured by the number of bed places has risen steeply since 2000 in European countries with the biggest stock of hotel accommodations: the United Kingdom, Germany, Italy, Spain and France.

Hotel capacity has risen only slowly (at less than 1% per year on average) in many countries where supply is the greatest: the United States, Germany, the United Kingdom, and France. On the other hand, hotel accommodation has expanded much more quickly in other major tourism destinations such as Italy, and above all in Mexico and in Spain. Among the countries with less hotel capacity than the preceding ones, the growth of supply has been particularly strong (at least 4% a year) in Poland, Turkey, Iceland, Australia and the Czech Republic. In all these countries, the customer base has been growing faster than capacity.

Hotel operating conditions vary greatly among countries, as can be appreciated from the great inter-country differences in average occupancy rates over the year, which range from 30% to over 65%. Countries with the highest rates are generally those that offer the most diversified and seasonally independent products (urban tourism, cultural tourism, business tourism, etc.) and enjoy the most diversified demand (residents, non-residents).

Occupancy rates have generally been rising. Hotel capacity in OECD countries, measured as the number of bed places, rose on average from 2003 to 2007 at a rate of 1.2% per year, while the customer base increased by 2.6% per year. Consequently, the average occupancy rate increased by more than two percentage points, from slightly under 52% in 2003 to around 54% in 2007. The picture varies greatly from country to country. Of the 25 OECD countries for which data are available over the entire period, only three saw their occupancy rate drop between 2003 and 2007: the Czech Republic, Greece and New Zealand. In these three countries, the customer base did not keep pace with the expansion in hotel capacity, which rose faster than the OECD average.


Table 1.11. **Hotels and similar establishments, 2003-08**

	Units	2008 Capacity (1 000)	Capacity average annual growth 2007/2003 %	Capacity annual growth 2008/2007 %	Nights spent average annual growth 2007/2003 %	Nights spent annual growth 2008/2007 %	2008 Occupancy rate %	2008 Average length of stay (days)
Australia	Bed places	679 ¹	4.0	..	4.7	..	65.2 ¹	2.2 ¹
Austria	Bed places	580	0.4	1.0	1.7	4.0	38.9	3.40
Belgium	Bed places	125	0.6	0.0	3.1	2.1	36.1	1.86
Canada	Rooms	378 ¹	..	..	..	..	..	..
Czech Republic	Bed places	258	2.3	3.9	3.6	1.4	35.7	3.72
Denmark	Bed places	73	1.8	0.0	4.9	-2.2	40.4	3.07
Finland	Bed places	121	-0.2	1.7	4.2	1.8	36.6	1.81
France	Bed places	1 256	0.4	0.2	2.5	-1.0	44.1	1.86
Germany	Bed Places	1 677	0.5	2.0	3.2	1.7	35.7	2.13
Greece	Bed places	716	2.1	2.1	4.6	..	25.0	4.08
Hungary	Bed places	155	-0.8	0.6	4.1	..	29.0 ¹	2.58
Iceland	Bed places	19	4.7	5.6	8.8	1.5	27.7	1.81
Ireland	Bed places	169	1.8	7.6	2.5	..	49.4 ¹	1.9 ¹
Italy	Bed places	2 143 ¹	2.1	..	2.6	..	32.5 ¹	3.26 ¹
Japan	Rooms	1 548	..	..	..	..	..	..
Korea	Rooms	61 ¹	..	..	..	..	..	..
Luxembourg	Rooms	14	0.0	-6.7	4.1	-4.4	26.1	1.95
Mexico	Bed places	1 167 ¹	4.1	..	7.5	..	54.8 ¹	3.68 ¹
Netherlands	Bed places	200 ¹	2.7	..	5.9	-4.5	46.7 ¹	1.76
New Zealand	Rooms	23 ¹	3.2	..	2.7	..	53.1 ¹	1.84 ¹
Norway	Bed places	157	1.7	1.9	4.3	-1.7	31.7 ¹	1.64
Poland	Bed places	211	9.1	11.1	14.3	3.8	32.8	1.93
Portugal	Bed places	274	3.5	..	4.1	-1.3	41.3	2.9
Slovak Republic	Bed places	70	5.1	4.5	-0.4	5.9	29.9	2.65
Spain	Bed places	1 685	3.1	2.6	4.5	-1.2	43.6	3.24
Sweden	Bed places	207 ¹	2.8	..	4.8	..	33.6 ¹	1.64 ¹
Switzerland	Bed places	241 ¹	-1.8	0.0	..	2.7	43.6 ¹	2.33
Turkey	Bed places	531 ¹	6.1	..	9.7	..	54.7 ¹	2.65 ¹
United Kingdom	Bed places	1 245 ¹	0.8	..	0.3	..	37.3 ¹	2.58 ¹
United States	Rooms	4 476 ¹	0.3	..	1.2	..	63.1 ¹	..
OECD total	Bed places	26 950²	1.2	..	2.7	..	49.5	..
Brazil	Bed places	..	..	..	..	..	..	..
Chile	Bed places	139 ¹	4.2	..	7.2	..	36.4 ¹	2.1 ¹
China	Bed places	2 969 ¹	12.0	..	14.3 ¹	..	61.0 ¹	2.67 ¹
Egypt	Bed places	422	8.6	10.9	20.4	15.9	63.3	10.1
Estonia	Bed places	45 ¹	12.7	3.4	9.8	0.1	35.4	1.91
India	Bed places	152 ¹	-2.9	..	..	..	..	..
Indonesia	Bed places	..	..	..	..	..	..	..
Israel	Bed places	128 ¹	0.6	..	7.5	..	51.8 ¹	2.61 ¹
Russian Federation	Bed places	447 ¹	5.3	..	6.8	..	36.0 ¹	..
Slovenia	Bed places	36 ¹	3.3	3.0	3.2	1.0	44.5	2.88
South Africa	Rooms	61 ¹	4.1	..	4.1 ¹	..	57.7 ¹	7.9 ¹

1. 2007 data.

2. To evaluate the total, one room has been accounted for two bed places.

Sources: World Tourism Organization, EUROSTAT, OECD data processing.

StatLink  <http://dx.doi.org/10.1787/764656146881>

Other collective accommodation includes campgrounds, holiday dwellings, youth hostels, B&Bs, etc. They are hard to track statistically, and data are not always available, reliable or consistent.


In many countries, campsites rank first in the number of nights spent (Table 1.12). They also attract a large portion of non-residents – on average, more than a third of all visitors (and well above that in Luxembourg and Austria). However, camping seems a rather sluggish industry: its accommodation capacity is virtually stagnant, and occupancy is in slow retreat. It is true that the changes underway in camping are more qualitative than quantitative. France has the largest number of campsites in Europe, and over the last ten years, campsites have been upgraded significantly in terms of the range of services offered. For example, the number of mobile homes available to tourists has increased and fewer camping sites are being rented empty.

Table 1.12. **Camping sites, 2003-08**

	2008 Capacity thousands of bed places	2007/2003 Capacity average annual growth %	2008/2007 Capacity average annual growth %	2007/2003 Nights spent average annual growth %	2008/2007 Nights spent average annual growth %	Percentage of nights spent by non- residents 2008 %
Austria	203	0.5	3.0	-2.8	2.1	79.9
Belgium	100	-3.5	0.7	-3.9	-4.4	60.2
Czech Republic	29	3.2	-0.4	-3.4	-13.1	20.1
Denmark	271	-1.0	2.2	-0.8	4.1	23.5
Finland	79	-1.6	-4.3	2.2	-4.3	16.7
France	3 689	0.2	-0.5	-0.1	1.1	35.7
Germany	839	1.4	2.4	-1.7	5.0	15.3
Greece	89	-0.8	-1.6	6.8	..	50.3 ¹
Hungary	88	-3.8	-4.1	-5.7	..	70.7 ¹
Ireland ¹	23	-6.3	-1.7	1.7	-14.3	28.7
Italy	1 332 ¹	-0.2	..	0.6	..	41.8 ¹
Luxembourg	48	-0.8	-0.3	-9.7	0.5	95.8
Netherlands	736 ¹	0.7	..	-2.6	-9.7	16.5
Norway	323	-0.1	-0.2	3.8	2.7	26.9
Poland	24	-19.5	-2.0	-12.6	-0.2	23.6
Portugal	185	2.2	1.1	1.9	-3.0	25.2
Slovak Republic	39	-9.9	2.7	-15.0	-10.0	61.2
Spain	764	-0.7	-0.2	0.7	-2.9	47.2
Sweden	461 ¹	0.2	..	-0.2	..	23.4 ¹
United Kingdom	1 218 ¹	..	..	..	..	6.8 ¹

1. 2007 data.

Sources: Eurostat, OECD data processing.

StatLink  <http://dx.doi.org/10.1787/764674132011>

Tourism jobs: A dynamic component of employment

The bulk of tourism employment is concentrated in accommodation and, especially, in restaurant and food services.⁹ In many OECD countries industrial employment is shrinking or growing only slowly, while employment in accommodation and food activities appears to be a particularly dynamic component, even compared with other services (Table 1.13). Between 2000 and 2007, the rate of growth in accommodation and food services employment in the OECD was 2.2%, or 0.6 percentage point above the one for services as a whole.

Table 1.13. **Employment in accommodation and food services, 1995-2008**


Average annual growth rate

	2000/1995				2007/2000				2008/2007				2008 AFS ¹ employment (1 000)	AFS ¹ employment as a percentage of overall employment
	Employment average annual growth %				Employment average annual growth %				Employment average annual growth %					
	AFS ¹	Services	Industry	Overall economy	AFS ¹	Services	Industry	Overall economy	AFS ¹	Services	Industry	Overall economy		
Australia	3.3	2.0	0.7	1.7	6.4	2.7	2.1	2.3	0.6	1.9	3.4	2.2	708.3	6.6
Austria	..	..	..	..	2.7	1.8	-0.6	1.0	-2.9	3.7	-3.2	1.5	251.1	6.2
Belgium	3.0	2.4	1.6	2.1	1.4	1.2	0.1	0.9	..	..	..	..	150.8 ²	3.4 ²
Canada	2.8	2.2	2.6	2.1	1.9	2.3	1.3	1.9	0.4	1.8	1.3	1.5	1 073.5	6.3
Czech Republic	0.3	0.9	-2.1	-0.7	1.8	0.7	0.6	0.4	-2.7	3.0	2.4	1.8	176.9	3.5
Denmark	0.6	1.6	0.2	1.0	3.0	1.0	-1.4	0.3	1.2	2.8	-0.9	1.7	82.0	2.9
Finland	4.8	2.7	2.4	2.2	1.4	1.7	0.0	0.9	6.0	1.5	0.6	1.6	89.0	3.5
France	3.5	2.9	0.0	2.1	2.4	1.3	-0.7	0.8	..	..	..	..	810.0 ²	3.6
Germany	2.4	1.3	-1.3	0.3	2.4	1.5	-1.0	0.6	2.2	1.8	1.1	1.6	1 458.2	3.8
Greece	4.1	2.7	0.9	1.4	2.2	2.8	1.3	1.4	..	..	..	..	317.9 ²	7.0 ²
Hungary	..	..	..	..	2.2	1.1	-0.3	0.3	0.7	-0.1	-2.7	-1.2	157.2	4.1
Iceland	6.8	2.8	0.5	2.0	-0.5	2.8	0.3	1.8	-2.3	-0.7	1.3	0.7	6.1	3.4
Ireland	9.1	6.6	5.7	5.5	2.8	4.2	2.8	3.3	-2.8	2.3	-6.2	0.3	128.6	6.1
Italy	3.8	2.0	0.0	1.0	5.1	2.1	0.5	1.4	2.2	1.8	-0.7	0.8	1 179.0	5.1
Japan	..	..	..	..	..	..	..	..	-2.3	0.4	-2.3	-0.4	3 340.0	5.2
Korea	3.5	3.0	-2.7	0.7	0.9	2.7	0.3	1.5	-0.4	1.5	-1.0	0.6	2 041.9	8.7
Luxembourg	2.2	5.5	0.6	4.1	2.4	3.8	3.0	3.4	..	..	..	..	15.0	4.5 ²
Mexico	3.6	3.5	7.8	3.2	5.9	2.6	2.0	1.8	5.9	3.2	1.3	2.3	2 800.2	6.4
Netherlands	..	..	..	..	3.2	1.6	0.3	1.1	-5.3	2.2	-4.2	1.5	339.7	4.0
New Zealand	2.4	2.1	-0.3	1.3	2.0	3.1	1.7	2.5	-6.5	1.4	-0.8	0.6	101.0	4.7
Norway	..	..	..	..	-1.2	1.5	0.6	1.1	1.5	3.5	3.1	3.3	68.0	2.7
Poland	..	..	..	..	2.7	1.8	0.6	0.7	..	..	..	..	291.0 ²	1.9 ²
Portugal	5.0	1.3	4.2	2.7	1.6	1.7	-1.3	0.4	10.6	3.2	-3.6	0.6	319.4	6.2
Slovak Republic	1.8	1.1	-1.3	-0.4	6.6	1.7	2.5	1.7	5.5	3.4	3.5	3.2	107.6	4.4
Spain	5.0	4.8	5.0	4.4	5.4	4.9	3.1	4.0	0.1	2.0	-5.5	-0.5	1 452.6	7.2
Sweden	..	..	..	..	3.0	1.8	-0.6	1.3	3.5	1.3	1.2	1.1	148.0	3.2
Switzerland	0.3	1.5	-1.5	0.6	-0.1	1.7	0.0	1.1	3.3	2.3	0.3	1.9	256.6	5.7
Turkey	..	..	..	..	3.5	2.6	1.0	-0.6	0.9	1.6	2.5	2.2	998.0	4.7
United Kingdom	-0.4	2.0	-0.4	1.2	2.0	1.5	-0.7	1.0	-1.1	2.4	-3.5	1.2	1 283.4	4.4
United States	2.2	2.6	1.3	2.4	1.9	1.1	-1.5	0.6	0.3	0.2	-3.7	-0.4	11 457.4	8.3
OECD total	2.6	2.5	1.0	1.9	2.2	1.6	-0.1	1.0	0.6	1.3	-1.3	0.6	31 608.4	6.0

1. AFS: accommodation and food services.

2. 2007 data.

Sources: OECD, Bureau of Labor Statistics (United States).

StatLink  <http://dx.doi.org/10.1787/764675564716>

The growth in accommodation and food services employment cannot, however, be attributed solely to the development of tourism. While nearly all hotel activity can be credited to tourism, this is not correct for restaurants, where up to three-quarters of the clientele will normally be local (staying in its usual environment). The sector's dynamism derives in large part from evolving lifestyles – the tendency of people to dine out instead of eating at home is a pronounced feature of developed economies. Yet, it is still true that many restaurants depend for their profitability on the tourist segment of their clientele.

Many countries have experienced a boom in the restaurant industry and associated employment. In the United States, for example, traditional (full-service) restaurants now employ more than 4.5 million people, or some 700 000 more than in 2000, and the

restaurant workforce grew by around 2.5% between 2000 and 2008. This pace has been emulated in other segments of the restaurant business, particularly fast food, which now employs more than 4 million in the United States. On the other hand, employment in the various types of accommodation establishments has been sluggish, remaining at between 1.8 and 1.9 million since 2000.

Box 1.6. **Employment concepts**

In this document, as for employment, the figures represent the “employment in tourism industries”, i.e. the actual employment in tourism industries whether they are associated or not to tourism spending. In fact, such a concept has been chosen to supply homogeneous data between countries.

It should be kept in mind that another concept “tourism employment”, i.e. employment directly attributable to tourism (which could be calculated as actual employment multiplied by a tourism ratio), would be more adequate to describe the role of tourism for employment. This is what the OECD recommends (see the OECD employment and tourism module).

Investment in tourism enterprises varies by region

The idea here is to measure a sector’s investment effort by its investment rate, which compares gross investment to gross value added at factor cost.¹⁰ Investment fluctuates sharply from one year to another. For this reason, Table 1.14 indicates the average investment rate over the period 2000-06, while the text highlights the most significant movements over that time. There are data available for 20 European countries.

As a general rule, investment rates are much higher in hotels than in restaurants, and even higher in comparison to travel agencies, two sectors that are much less capital-intensive. In particular, the cost of physical premises for hotels far outweighs those in the other two sectors.


The hotel investment rate differs greatly by country. It has been particularly high in countries of southern Europe where tourism is important, and in the new member countries of the European Union, but it has been relatively weak in northern Europe. The countries of western Europe can be divided between high-effort countries (France, Belgium, Austria) and low-effort (Germany, Luxembourg, the Netherlands).

Portugal, the Slovak Republic, and Greece (to a lesser extent) have maintained especially high investment rates throughout the period, and they rose even further in 2005 and 2006 (the last year for which data are available). In Hungary the profile is different: the investment effort was particularly robust in 2003, but declined in the following three years to more moderate levels of around 30%. The Czech Republic shows a similar pattern, with two exceptional years in 2002 and 2003, in the aftermath of the floods in the summer of 2002. Gross investment in each of those years was around three times the amount invested in 2001. Spain, Italy and France have averaged investment rates exceeding 30%. Spain and France have kept their investment rates relatively steady from one year to the next, whereas in Italy the investment rate has varied considerably over the years. In Belgium, the early years of the decade saw investment rates of around 35%, but they have declined since 2003 to around 25%.

Table 1.14. **Investment in hotels, restaurants and travel agencies, 2000-06**
Average annual investment rates

	Hotels %	Restaurants %	Travel agencies %
Austria	23.7	10.8	11.7
Belgium	29.2	26.2	13.3
Czech Republic	36.1	18.9	17.4
Denmark	23.1	11.3	5.1
Finland	14.4	9.1	8.3
France	30.0	18.5	6.6
Germany	8.9	5.3	3.7
Greece	37.0	12.9	14.0
Hungary	45.3	31.2	19.2
Ireland	27.6	16.7	6.2
Italy	33.7	14.5	8.9
Luxembourg	13.5	8.7	..
Netherlands	17.8	7.6	7.6
Norway	16.6	10.6	8.3
Poland	26.3	17.5	18.0
Portugal	53.1	24.6	19.4
Slovak Republic	51.6	26.4	11.9
Spain	30.7	10.1	7.6
Sweden	25.5	15.6	7.5
United Kingdom	21.4	17.7	9.2

Sources: Eurostat, OECD.

StatLink  <http://dx.doi.org/10.1787/764821673764>

In the restaurant sector, the classification of countries by their investment rate is similar to that for hotels, but the levels are much lower: as for hotels, Hungary, the Slovak Republic and Poland rank among the countries with the highest investment rates, at 25% or above. Belgium also joins this group.

When it comes to travel agencies, investment rates are on average still lower than in restaurants, but the country ranking is similar to those for hotels and restaurants.

Notes

1. "OECD countries" refers to the 30 countries that are currently members of the Organisation. Statistics on the OECD zone are always calculated for these 30 countries, even if some were not yet members at the time.
2. The "Travel" item does not include international trade in passenger transportation services, which are covered by another item in the Balance of Payments. The "traveller" in the Balance of Payments is not defined in the same way as the "visitor" in tourism statistics (OECD, 2008).
3. For the world as a whole, there are some statistical discrepancies that must be recognised. The sum of receipts by country exceeds the sum of expenditures by country, and this gap has tended to increase: from 5% in 1996, it now stands at nearly 10%.
4. For many countries, Balance of Payments data isolating passenger transportation from goods transport have only been available since a few years.
5. Eleven countries – Austria, Belgium, Finland, France, Germany, Ireland, Italy, Luxembourg, the Netherlands, Portugal and Spain – adopted the euro upon its creation on 1 January 1999. Greece adopted it on 1 January 2001, and the Slovak Republic on 1 January 2009.
6. The distribution of trips by purpose is not available for all countries. The comments here apply only to those countries (the majority) for which data are available.

7. In the conventional treatment of tourism statistics, short stays have traditionally been defined as stays of three nights at most, and long stays with at least four nights. This distinction differs from practice in the tourism industry which distinguishes, for example, between weekends, mid-weeks, weeks, etc.
8. An SME is conventionally defined as a firm, regardless of its activity, that employs up to 250 people (salaried and non-salaried staff).
9. Passenger transportation is also an important component of tourism activity. However, for many countries it is still difficult to isolate the passenger share of transportation employment, which contributes to tourism, and the freight share, which does not.
10. The data are taken from annual structural surveys. The results of such surveys become available more slowly than those, for example, from economic surveys.

Bibliography

- EUROSTAT (Statistical Office of the European Communities) (2008), *Panorama on Tourism*, 2008 Edition, EUROSTAT, Luxembourg.
- EUROSTAT, OECD, United Nations Statistics Division (UNSD) and World Tourism Organization (UNWTO) (2008), *Tourism Satellite Accounts: Recommended Methodological Framework*, Luxembourg, Madrid, New York, Paris, <http://unstats.un.org/unsd>.
- Laimer, P. and P. Öhlböck (2004), "Indicators Measuring the Sustainability of Tourism – Several Considerations and Results from the Austrian Perspective", paper presented during the 7th International Forum on Tourism Statistics, Sweden, 9-11 June, www.tourismforum.scb.se.
- Niel, X. (2008), "Entreprises d'hébergement touristique : les petites structures périlissent", Services Division, INSEE, France, paper presented at the 9th International Forum on Tourism Statistics, OECD, Paris, 19-21 November, www.forumstat.tourisme.gouv.fr.
- OECD/Eurostat (2008), *OECD Statistics on International Trade in Services 2008, Volume I, Detailed Tables by Service Category*, OECD Publishing.
- Smeral, E. (2008), "Growth Accounting for Tourism Industries", Austrian Institute of Economic Research (WIFO), paper presented at the 9th International Forum on Tourism Statistics, OECD, Paris, 19-21 November, www.forumstat.tourisme.gouv.fr.
- United Nations Department of Economic and Social Affairs (UNDESA) and UNWTO (2008), *International Recommendations on Tourism Statistics 2008*, ST/ESA/STAT/SER.M/83/Rev.1, United Nations, Madrid and New York.
- UNWTO (2009), *World Tourism Barometer*, Volume 7, Issue 2, June and Interim Update, September 2009.

ANNEX 1.A1

*Structural Business Statistics by Size Class for Hotels,
Restaurants and Travel Agencies*

Table 1.A1.1. Hotels: Enterprises by size-class

		Employment						Turnover					Gross investment					Number of enterprises				
		0-9	10-19	20-49	50-249	250 or more	1 000	0-9	10-19	20-49	50-249	250 or more	0-9	10-19	20-49	50-249	250 or more	0-9	10-19	20-49	50-249	250 or more
		%	%	%	%	%		%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Austria	2006	37.4	19.0	18.8	18.8	6.0	101.2	31.8	19.1	20.6	20.9	7.5	23.6	27.5	25.7	21.1	2.1	84.1	9.9	4.5	1.4	0.1
Belgium	2006	28.8	16.6	18.0	26.0	10.6	20.8	37.4	11.8	20.5	21.0	9.3	38.8	19.1	18.6	18.6	4.9	84.3	8.9	4.6	2.0	0.1
Czech Republic	2007	11.5	11.4	26.3	34.4	16.5	33.7	12.5	7.8	20.5	39.0	20.2	25.5	11.0	21.1	30.3	12.1	73.5	9.5	11.7	4.8	0.6
Denmark	2006	10.6	10.5	22.7	41.7	14.5	24.1	22.7	9.9	18.7	36.3	12.4	..	..	..	..	..	68.3	12.2	11.9	7.2	0.4
Finland	2006	19.0	8.2	15.7	24.0	33.2	11.9	16.9	7.3	14.4	25.0	36.3	48.2	5.4	16.1	17.9	12.5	89.5	4.5	3.8	1.9	0.3
France	2006	38.1	16.7	14.7	11.8	18.8	248.4	35.6	14.4	14.4	11.8	23.9	45.7	10.4	11.4	8.0	24.5	90.0	6.7	2.6	0.6	0.1
Germany	2006	27.3	21.4	23.4	16.8	11.1	395.5	22.0	17.4	20.4	20.5	19.7	..	..	..	..	..	75.1	15.2	7.7	1.8	0.2
Greece	2006	53.7	11.8	12.4	14.2	7.8	73.8	42.7	15.1	10.8	20.1	11.4	55.2	13.5	5.3	19.8	6.2	94.2	3.4	1.8	0.5	0.1
Hungary	2006	22.5	11.2	16.9	24.6	24.8	24.9	14.1	7.2	14.8	26.9	36.9	31.8	4.8	10.2	24.1	29.1	87.3	6.5	4.3	1.7	0.2
Ireland	2006	11.0	5.5	14.1	58.3	11.0	50.9	12.3	5.5	13.1	56.9	12.2	14.2	2.8	14.0	63.6	5.3	78.2	5.9	6.4	9.2	0.4
Italy	2006	41.2	21.1	15.7	13.4	8.7	279.4	33.7	21.2	16.0	16.0	13.0	20.2	38.9	6.6	21.6	12.7	85.1	10.3	3.5	0.9	0.1
Korea ¹	2004	62.9	3.3		33.8 ²		139.6	34.8	3.4		61.8 ²		..	..	..	..	..	98.0	0.9		1.1 ²	
Luxembourg	2006	26.9	20.2	20.0		32.9 ²	3.5	28.9	18.6	20.2		32.3 ²	8.3	8.3	33.3		50.0 ²	76.9	13.5	6.9	2.5	0.3
Netherlands	2005	25.9	11.5	15.4	21.4	25.8	64.3	18.3	10.8	15.6	22.8	32.5	..	..	..	..	..	82.0	9.5	5.8	2.4	0.3
New Zealand	2007	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	73.0	14.4	8.4	2.2	2.0
Norway	2006	16.7	12.3	21.0	34.0	16.0	26.5	16.8	11.4	19.1	34.1	18.7	..	..	..	..	..	80.1	9.0	7.0	3.6	0.3
Poland	2005	39.2	8.8	12.5	17.7	21.9	58.9	23.4	8.7	12.8	24.3	30.8	15.3	8.1	19.4	22.3	34.9	93.7	3.1	2.1	0.9	0.2
Portugal	2006	20.6	10.0	17.5	32.9	19.0	53.5	12.6	8.3	16.4	37.9	24.9	31.2	5.4	16.0	27.9	19.5	87.0	5.7	4.4	2.6	0.3
Spain	2006	16.0	8.7	18.1	31.0	26.1	273.2	11.3	7.7	18.8	33.1	29.1	17.1	5.1	17.3	35.9	24.6	79.7	8.2	7.5	4.0	0.5
Sweden	2006	17.6	12.9	24.5	28.9	16.1	36.3	18.3	11.2	23.4	29.1	18.0	40.1	10.9	14.8	19.1	15.1	84.3	6.9	6.1	2.5	0.1
United Kingdom	2006	10.1	10.3	14.1	25.6	39.9	391.2	10.7	9.2	12.0	22.9	45.1	16.6	8.1	8.9	20.4	45.9	62.3	18.8	11.2	6.9	0.8

1. Establishments.

2. This percentage covers several size-classes.

Source: OECD, Structural Business Statistics by Size-Class.

StatLink  <http://dx.doi.org/10.1787/764823182682>

Table 1.A1.2. Restaurants: Enterprises by size-class

		Employment					Turnover					Gross investment					Number of enterprises					
		0-9	10-19	20-49	50-249	250 or more	1 000	0-9	10-19	20-49	50-249	250 or more	0-9	10-19	20-49	50-249	250 or more	0-9	10-19	20-49	50-249	250 or more
		%	%	%	%	%		%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Austria	2006	60.2	14.1	10.4	9.6	5.7	141.4	53.1	14.1	11.5	12.6	8.6	42.2	17.2	19.5	15.9	5.2	92.9	5.0	1.6	0.5	0.0
Belgium	2006	62.3	17.5	10.0	3.4	6.8	145.1	60.0	14.6	10.7	4.5	10.2	74.9	11.2	8.0	1.5	4.4	93.5	5.0	1.3	0.1	0.0
Czech Republic	2007	67.4	16.6	7.2	5.0	3.8	124.8	63.5	15.2	8.6	7.2	5.4	48.2	20.7	12.5	7.2	11.4	95.8	3.4	0.7	0.2	0.0
Denmark	2006	29.4	18.1	22.8	15.3	14.3	80.5	37.9	16.3	17.3	13.0	15.5	..	..	..	..	..	84.3	9.1	5.2	1.2	0.2
Finland	2006	43.5	10.0	9.7	11.4	25.4	43.1	44.9	10.3	11.1	12.5	21.3	39.7	11.1	16.7	14.3	18.3	94.2	3.5	1.6	0.6	0.1
France	2006	53.6	11.4	11.7	4.6	18.6	667.0	50.0	11.2	13.4	5.0	20.5	75.1	7.2	5.9	3.8	7.9	95.1	3.2	1.4	0.2	0.0
Germany	2006	43.2	18.5	15.9	11.6	10.8	920.1	43.6	15.2	13.7	12.2	15.2	..	..	..	..	..	86.0	9.4	3.7	0.9	0.1
Greece	2006	76.3	10.6	6.5	3.5	3.2	229.9	63.7	15.0	9.7	6.1	5.6	59.6	19.3	7.4	8.4	5.3	97.1	2.1	0.6	0.1	0.0
Hungary	2006	59.3	14.8	11.1	8.0	6.8	102.0	50.8	13.8	12.9	12.5	9.9	46.3	13.0	12.0	14.3	14.4	94.2	4.0	1.4	0.4	0.0
Ireland	2006	29.7	22.7	20.2	17.8	9.6	97.7	35.7	20.8	19.0	16.4	8.0	25.9	19.9	27.1	24.5	2.6	75.0	16.4	6.4	2.1	0.1
Italy	2006	69.3	10.8	4.5	3.1	12.2	836.0	63.2	12.2	5.1	3.9	15.6	76.2	7.9	4.8	1.6	9.4	96.1	3.2	0.6	0.1	0.0
Korea ¹	2004	88.7	6.1		5.2 ²		1 556.0	82.2	8.3		9.4 ²		..	..	..	..	..	85.9	10.7		3.4 ²	
Luxembourg	2006	49.2	19.4	8.6		22.8 ²	11.9	47.1	19.9	9.0		24.0 ²	25.0	33.3	16.7		25.0 ²	90.8	7.1	1.5	0.3	0.2
Netherlands	2005	60.4	13.4	9.8	6.0	10.4	238.0	52.3	14.8	9.2	6.2	17.6	..	..	..	..	..	91.6	6.3	1.7	0.3	0.0
New Zealand	2007	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	65.6	21.8	10.6	1.4	0.6
Norway	2006	30.5	23.4	20.8	14.6	10.7	57.1	30.6	20.5	18.2	16.0	14.7	..	..	..	..	..	79.3	13.7	5.7	1.2	0.1
Poland	2005	73.8	6.1	4.8	4.9	10.5	165.0	64.5	7.7	7.8	6.7	13.3	71.2	7.4	4.8	5.0	11.6	97.6	1.6	0.6	0.2	0.0
Portugal	2006	65.6	11.4	9.1	4.6	9.3	222.5	61.7	12.0	10.4	5.3	10.6	61.1	14.0	13.4	5.9	5.7	96.5	2.5	0.9	0.2	0.0
Spain	2006	62.9	12.3	8.9	6.2	9.7	986.1	62.0	13.2	10.2	6.0	8.5	55.2	15.7	12.3	8.0	8.8	95.1	3.5	1.1	0.3	0.0
Sweden	2006	50.6	14.7	15.1	7.8	11.8	88.1	51.8	13.8	14.1	8.2	12.1	59.9	9.8	10.9	5.6	13.8	93.5	4.1	2.0	0.3	0.0
United Kingdom	2006	27.0	19.7	8.3	7.4	37.6	1 535.4	26.0	15.2	8.0	8.7	42.1	29.6	14.4	6.3	9.4	40.4	75.4	19.8	3.6	1.0	0.2

1. Establishments.

2. This percentage covers several size-classes.

Sources: OECD, Structural Business Statistics by Size-Class.

StatLink  <http://dx.doi.org/10.1787/764845821715>

Table 1.A1.3. Travel agencies: Enterprises by size-class

		Employment						Turnover					Gross investment					Number of enterprises				
		0-9	10-19	20-49	50-249	250 or more	1	0-9	10-19	20-49	50-249	250 or more	0-9	10-19	20-49	50-249	250 or more	0-9	10-19	20-49	50-249	250 or more
		%	%	%	%	%		%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Austria	2006	30.5	13.5	16.2	39.9 ²	10 850	16.7	10.1	15.6	57.6 ²		13.8	17.2	13.8	55.2 ²		87.3	6.9	3.8	1.9	0.1	
Belgium	2006	34.6	8.5	12.2	10.1	34.5	7 950	25.4	9.2	13.0	6.6	45.9	45.0	5.0	25.0	15.0	10.0	92.0	4.0	2.7	0.9	0.5
Czech Republic	2007	50.5	13.1	11.1	14.5	10.8	11 231	31.4	11.6	17.2	28.3	11.5	37.1	21.4	25.4	8.8	7.3	97.0	1.9	0.8	0.3	0.0
Denmark	2006	26.9	17.8	0.0	55.3	0.0	6 334	23.5	14.2	0.0	62.3	0.0	..	..	..	..	..	80.4	10.2	4.8	4.3	0.3
Finland	2006	29.9	9.3	10.5	11.8	38.5	4 832	24.4	9.1	14.6	23.6	28.2	83.3	5.6	5.6	5.6	0.0	94.7	2.9	1.4	0.6	0.4
France	2006	25.7	12.1	17.0	17.7	27.6	42 381	29.0	11.6	16.2	19.6	23.7	30.2	10.4	14.6	20.8	24.0	86.2	7.6	4.4	1.4	0.3
Germany	2006	41.9	11.7	13.4	16.0	17.0	63 619	14.4	5.0	9.4	24.3	46.9	..	..	..	..	..	89.5	6.2	2.9	1.2	0.2
Greece	2005	56.4	13.6	20.8	9.2 ²	14 506	39.0	17.6	27.8	15.6 ²		71.4	7.1	10.7 ²				92.5	4.3	2.8	0.4 ²	
Hungary	2006	0.0	31.4	28.5	40.1	0.0	6 322	0.0	27.8	23.2	49.0	0.0	0.0	49.9	20.0	30.1	0.0	0.0	61.3	25.8	12.9	0.0
Italy	2006	57.4	14.0	10.1	11.2	7.3	45 588	33.2	13.5	17.9	21.8	13.6	21.2	9.8	3.3	63.6	2.2	93.8	4.3	1.4	0.5	0.1
Korea ¹	2006	56.3	12.2	11.9	19.6 ²	26 664	44.7	20.2	8.8	26.2 ²		..	..	..	..	..		92.2	5.1	2.0	0.8 ²	
Luxembourg	2006	30.8		69.2 ²		642	56.2		43.8 ²			..	..	..	..	..		86.0	5.4	6.5	2.2	0.0
Netherlands	2005	29.1	9.5		61.4 ²	23 404	15.9	11.1	14.6	16.2	42.2	..	..	..	..	..		88.2	5.1	4.9	1.3	0.6
Norway	2006	39.0	15.9	14.7	19.6	10.8	5 883	48.2	27.2	24.6	0.0	0.0	..	..	..	..		92.5	4.8	1.9	0.7	0.1
Poland	2005	69.4	5.0	6.4	10.0	9.2	16 949	45.6	7.6	23.5	17.4	5.8	50.0	2.9	11.8	17.6	17.6	97.7	1.2	0.7	0.4	0.1
Portugal	2006	49.6	21.0	29.5	0.0	0.0	9 580	34.4	22.2	43.4	0.0	0.0	44.7	21.1	34.2	0.0	0.0	88.0	6.6	4.1	1.1	0.2
Slovak Republic	2006	35.0	40.4	13.7	10.9	0.0	2 526	36.1	14.0	33.9	16.0	0.0	26.8	30.4	6.3	36.6	0.0	84.1	13.1	2.0	0.9	0.0
Spain	2006	33.1	9.4	9.5	13.4	34.6	56 782	13.0	5.5	14.9	18.6	48.0	34.5	10.9	12.6	7.6	34.5	92.7	4.2	2.0	0.9	0.2
Sweden	2006	27.4	8.2	10.2	20.3	33.9	12 449	15.5	5.6	7.1	20.1	51.8	54.6	18.9	7.6	8.8	10.1	95.4	2.3	1.2	0.8	0.3
United Kingdom	2006	16.4	6.8	8.3	15.7	52.8	114 549	15.3	7.2	9.6	16.9	51.0	28.5	11.1	6.9	16.2	37.2	83.7	8.3	4.5	2.7	0.8

1. Establishments.

2. This percentage covers several size-classes.

Sources: OECD, Structural Business Statistics by Size-Class.

StatLink  <http://dx.doi.org/10.1787/764883818610>



From:
OECD Tourism Trends and Policies 2010

Access the complete publication at:

<https://doi.org/10.1787/tour-2010-en>

Please cite this chapter as:

OECD (2010), "Tourism Trends in the OECD Area and Beyond", in *OECD Tourism Trends and Policies 2010*, OECD Publishing, Paris.

DOI: <https://doi.org/10.1787/tour-2010-3-en>

This work is published under the responsibility of the Secretary-General of the OECD. The opinions expressed and arguments employed herein do not necessarily reflect the official views of OECD member countries.

This document and any map included herein are without prejudice to the status of or sovereignty over any territory, to the delimitation of international frontiers and boundaries and to the name of any territory, city or area.

You can copy, download or print OECD content for your own use, and you can include excerpts from OECD publications, databases and multimedia products in your own documents, presentations, blogs, websites and teaching materials, provided that suitable acknowledgment of OECD as source and copyright owner is given. All requests for public or commercial use and translation rights should be submitted to rights@oecd.org. Requests for permission to photocopy portions of this material for public or commercial use shall be addressed directly to the Copyright Clearance Center (CCC) at info@copyright.com or the Centre français d'exploitation du droit de copie (CFC) at contact@cfcopies.com.