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in focus

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BALANCE OF PAYMENTS

Contents

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EU remains world's top destination for tourists but external travel balance shows a deficit of ECU -1.3 bn in 1998

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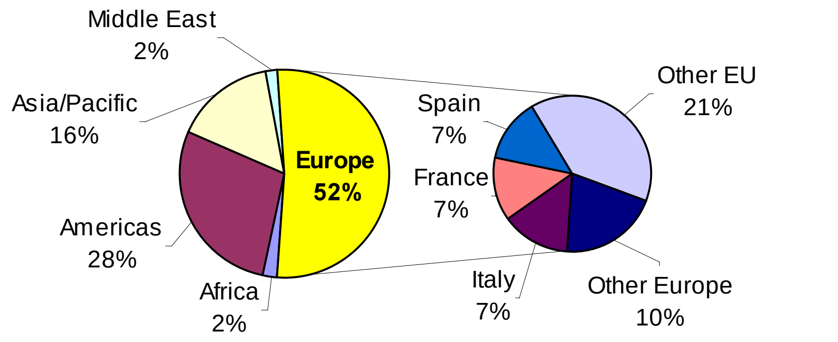
The European Union (EU) as a whole maintained in 1998 its leading position in world tourism as a main source and a main destination of international tourist flows. Spain, France and Italy were the most attractive destinations for one out of four tourists in the world. However, a significant slowdown of the extra-EU receipts produced for the first time an EU external travel[1] balance deficit of ECU –1.3 bn. The USA remained the EU's first foreign partner. EU tourism with the Mediterranean Basin and Other European countries expanded steadily since 1995. The role of small and medium sized enterprises in terms of employment and the recent wave of mergers concerning the European tourist services providers highlight the economic stake of this sector.

World travel receipts in 1998²



The EU remains the top earner and spender in tourism world-wide in 1998[2]…

The 1998 global tourism results reflect a positive trend over 1997. Receipts[1] (exports)[3] expressed in ECU increased by 2.1% rising to ECU 379.3 bn. However this result shows a significant slowdown of the 9% annual growth average recorded between 1992 and 1997.

Tourist arrivals followed their upward trend, exceeding by 2.4% the level reached in 1997 at 635 million tourists (World Tourism Organisation data). The average annual growth of 5% registered between 1989 and 1993 slowed down during the second half of the decade to 3.5%. Nevertheless, unfavourable factors like the slow economic recovery, sustained unemployment levels in major industrialised countries and the Asian financial crisis made this performance remarkable.

In 1998 market share between the main blocks was kept unchanged both in terms of receipts and tourist arrivals. Europe as a whole accounted for 52% of world travel receipts and 61% of global tourist arrivals. The European Union confirmed its leading position in world tourism as a main source and a main destination of international tourist flows. The EU world market share amounted to 42% in terms of receipts and 44% in terms of expenditure[1] (imports)[3], while it concentrated 40% of the international arrivals of tourists.

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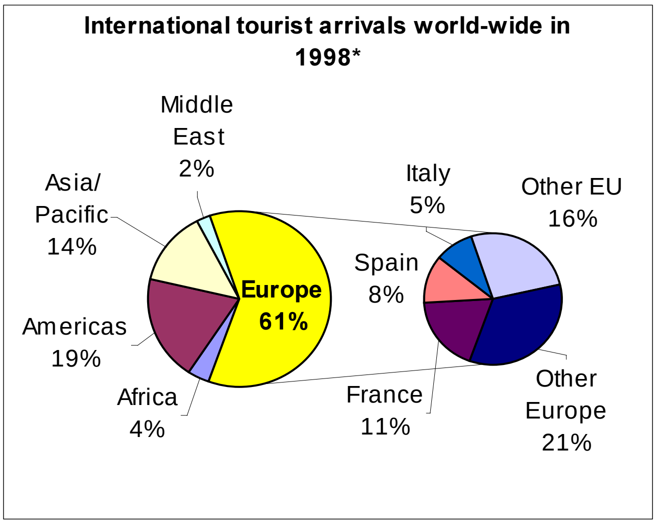
[1] *See methodological notes at the end of the document*
[2] *Source: Eurostat complemented with International Monetary Fund (IMF)*
[3] *Transactions among EU Member States are included*

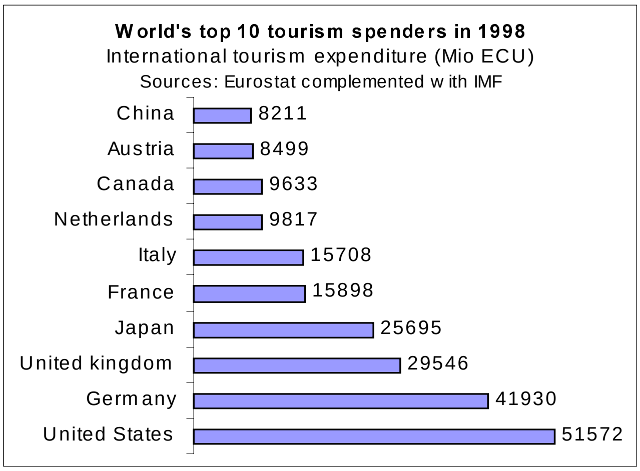
Spain, France and Italy alone totalled more than a half of the EU receipts. They also accounted for 60% of arrivals in the EU and were chosen by one out of four tourists in the world as their destination. Americas as a whole and Asia and the Pacific were far behind, representing respectively 28% and 16% of the total world travel receipts, and 19% and 14% of international tourist arrivals.

As regards accommodation capacity, almost 12 out of the 29 million hotel bed-places in the world (41%) were supplied by Europe, of which three-fourths by the European Union. The Americas came second with a share amounting to 32% (1997 figure) of the world's hotel capacity, followed by Asia and the Pacific (24% in 1997).



In the World's top for 1998, EU Member States accounted for 5 of the 10 leading tourist destinations. France remained the world's most popular destination, representing 11% of the World total in terms of tourist arrivals, while Spain ranked second with a 7.5% share of the total, followed by the United States (7.3%), Italy (5.5%) and the United Kingdom (4.1%).

As regards international travel receipts, the USA head the list of the biggest earners with receipts amounting to ECU 74.4 bn and corresponding to 20% of the world total. France, Spain and Italy arrived far behind with equal shares of 7%. The United Kingdom is following with a share of 6%.

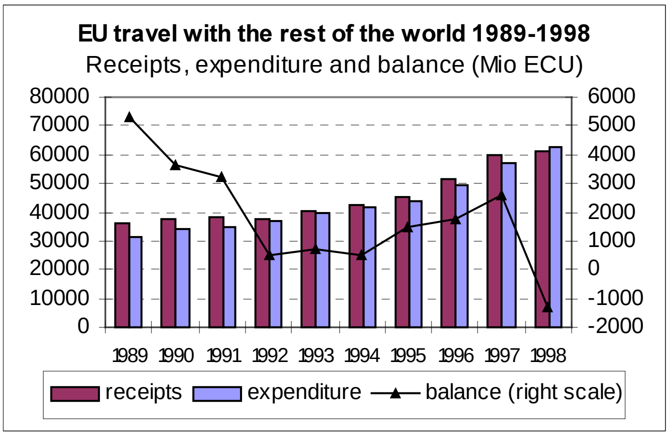


Finally, the USA followed by Germany were the top travel spenders with ECU 51.6 bn and ECU 41.9 bn respectively in 1998, each representing 15% and 12% of the world's total travel expenditure. The United Kingdom (ECU 29.5 bn, 9% of the total) and Japan (ECU 25.7 bn, 7% of the total) ranked third and fourth. Moreover, the 1998 Balance of Payments figures highlighted a 13% fall in Japan travel expenditure compared to 1997 (to be added to the contraction of 11% already recorded between 1996 and 1997). This result placed Japan behind the United Kingdom in 1998 (the UK registering at the same time a significant 17% increase in travel expenditure).

… but extra-EU travel shows a deficit in 1998 of ECU -1.3 bn

In contrast with the leading position of the European Union in international tourism, the EU travel balance with the rest of the world[4] reversed from a surplus of ECU 2.6 bn in 1997 to a deficit of ECU –1.3 bn in 1998. This deterioration was mainly due to the stagnation of the extra-EU receipts from travel services: they were up by 2% only (against 16% between 1996 and 1997) whereas extra-EU expenditure gained 9% over 1997, pushing the balance into deficit.

The significant travel surplus registered by the EU with the rest of the world in 1989 at ECU 5.3 bn shrank sharply during the first half of the decade to fall at ECU 0.5 bn in 1994. The more pronounced contraction, which was recorded between 1991 and 1992, illustrates the changeover from EU-12 to EU-15 that reduced the extra-EU for the benefit of the intra-EU. The three consecutive years of growing surplus between 1995 and 1997 represent a trend that had not been seen for at least 15 years. But this extra-EU balance recovery, after having reached a peak in 1997, fell into deficit in 1998.

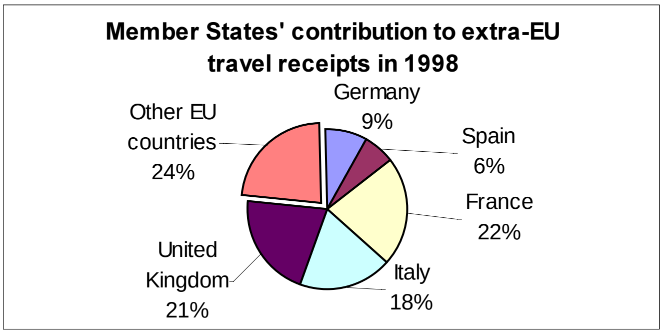


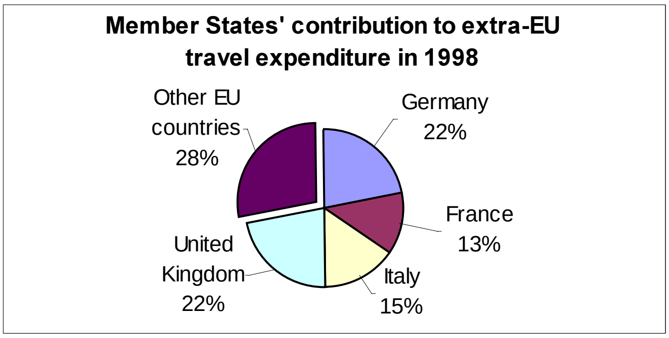
Slowdown of the receipts earned from the extra-EU by the main actors led the EU external balance into deficit

Five countries (France, the United Kingdom, Italy, Germany and Spain) represented in 1998 almost four-fifths of the extra-EU receipts from travel services. If the weight of France decreased from 26% to 22% between 1992 and 1998, the UK and Italy strengthened their share in the extra-EU travel receipts over the same period, from 18% to 21% and from 15% to 18% respectively. To a lesser extent, Germany and Spain perceived respectively 9% and 6% of the extra-EU travel receipts in 1998.

As a correlation to the extra-EU travel receipts, the number of nights spent in EU countries[5] by extra-EU visitors in hotels and other collective accommodation establishments, can be taken into account. According to Eurostat tourism statistics, the UK (37% of the nights spent in EU by extra-EU visitors), Italy (19%) and France (13%) represented, in 1997, 70% of the total number of nights spent in EU by extra-EU visitors.

On the other hand, four Member States concentrated 72% of the EU external expenditure in travel in 1998: with a share of 22% each, the UK and Germany ranked first. But while the weight of the UK in Extra-EU expenditure has been increasing by 5 points since 1992, Germany recorded an inverse trend (-7 points between 1995 and 1998). Italy (15%) and France (13%) followed them.





The reversal of the extra-EU travel balance in 1998 was largely explained by the slowdown (or even the drop) recorded by these five major actors in terms of receipts. France increased its extra-EU receipts by 3% only, instead of 7% the year before. The UK's 8% growth in 1998 contrasted with the 23% experienced in 1997 (and the 12% average over the period 1992-1997). Spain's extra-EU receipts, after a growth of 17% in 1996 and 11% in 1997, increased by only 3% in 1998. For its part, Italy reduced its extra-EU receipts by 11% (for the benefit of its receipts inside the EU), after the 18% expansion between 1996 and 1997. Finally Germany also reversed the upward trend recorded during the previous years (+14% in particular in 1997 over 1996), with a 2% contraction of its receipts.

[4] *Excluding intra-EU transactions*
[5] *Excluding Belgium, Ireland, the Netherlands and Sweden*

Consequently, the travel balance of France, Spain, the United Kingdom and Italy with the extra-EU deteriorated in 1998: France and Spain maintained a still consistent but lower surplus of respectively ECU 5.4 bn and ECU 1.7 bn (0.6 bn and 0.1 bn less compared to 1997). The UK 1997 small surplus of ECU 0.5 bn turned into a deficit of ECU –0.6 bn, while Italy reduced its surplus by ECU 2.1 bn (ECU 1.7 bn against ECU 3.8 bn in 1997). Finally, the permanent deficit registered by Germany stagnated at ECU –8.4 bn. The decisive weight of these five Member States in the extra-EU receipts from travel led to a degradation of the EU 1997 surplus by ECU 3.9 bn which produced a deficit balance for the first time of ECU –1.3 bn in 1998.

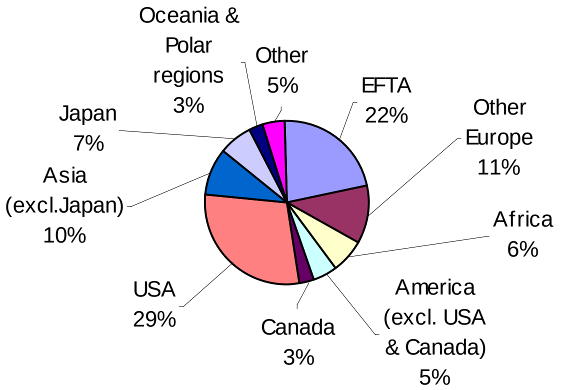
Extra-EU travel receipts, expenditure and balances 1997-1998 (Mio ECU)

		EU	BLEU	DK	D	EL	E	F	IRL	I	NL	A	P	FIN	S	UK
Receipts	**1997**	59736	1068	:	5399	1724	3664	12861	:	12568	1443	2068	977	831	:	11970
	1998	60945	1377	:	5303	1614	3790	13234	:	11125	1665	2209	961	700	:	12924
	Change	*2%*	*29%*	*:*	*-2%*	*-6%*	*3%*	*3%*	*:*	*-11%*	*15%*	*7%*	*-2%*	*-16%*	*:*	*8%*
Expenditure	**1997**	57119	1850	:	13773	570	1832	6926	:	8760	2421	3771	477	658	:	11443
	1998	62277	2215	:	13710	760	2095	7844	:	9463	2701	3390	494	739	:	13568
	Change	*9%*	*20%*	*:*	*0%*	*33%*	*14%*	*13%*	*:*	*8%*	*12%*	*-10%*	*4%*	*12%*	*:*	*19%*
Balance	**1997**	2617	-782	:	-8375	1153	1833	5935	:	3809	-978	-1703	500	172	:	527
	1998	-1332	-837	:	-8407	854	1695	5390	:	1662	-1036	-1182	467	-40	:	-645

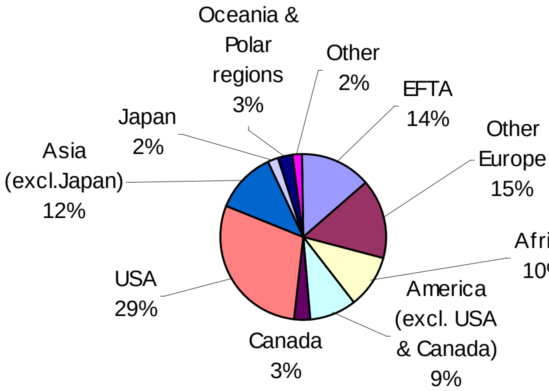
The USA, first extra-EU partner, EFTA[6] and Other Asian countries were the main responsible for the reversal of the extra-EU balance

The deterioration of the EU's travel balance with the rest of the world left unchanged the share of the main extra-EU tourism partners. The USA remained the biggest purchaser of goods and services provided by the EU to non-residents in terms of travel as well as the most popular destination outside the European Union for EU residents (the share of the USA amounted to 29% of both extra-EU travel receipts and expenditure). The second main spenders were the EFTA countries (accounting for 22% of the extra-EU receipts) before Asia (17% including Japan, 7%) and the Other European countries[7] (11%). On the other hand, the EU residents' favourite destinations after the USA were the Other European countries which represented 15% of the extra-EU travel expenditure, followed by Asia (14%), the EFTA countries (14%) and Africa (10%).

Extra-EU travel receipts by geographic partner zone in 1998



Extra-EU travel expenditure by geographic partner zone in 1998



According to their importance in extra-EU travel market, the partners responsible for the reversal of the EU travel balance with the rest of the world in 1998 were primarily the EFTA countries (the EU surplus with EFTA was reduced by ECU 1.2 bn on 1997) and Other Asian countries (contraction of ECU 1.5 bn of which one third was attributable to Japan). To a lesser extent, the degradation of the EU deficit vis-à-vis Other European countries (from ECU –2.1 bn in 1997 to ECU –2.9 bn in 1998) and America as a whole (decreasing by ECU 0.6 bn at ECU –3.8 bn) also contributed to the fall registered by the extra-EU balance in 1998.

[6] *For a definition of the acronyms see methodological notes at the end of the document*
[7] *Other European countries are European countries other than EU and EFTA countries, that is to say Central and Eastern European Countries (CEECs) and Russia*

Extra-EU travel by geographic partner zone 1997-1998 (Mio ECU)	Receipts				Expenditure				Balance	
	1997	1998	Change	Share in extra-EU in 1998	1997	1998	Change	Share in extra-EU in 1998	1997	1998
Extra-EU	**59 736**	**60 945**	**2%**	**100%**	**57 119**	**62 277**	**9%**	**100%**	**2 617**	**-1 332**
EFTA	13 748	13 611	-1%	22%	7 452	8 564	15%	14%	6 296	5 047
Other European countries	6 472	6 692	3%	11%	8 579	9 600	12%	15%	-2 107	-2 908
of which:										
Russia	1 964	1 844	-6%	3%	807	916	13%	1%	1 157	928
Turkey	540	540	0%	1%	2 448	2 304	-6%	4%	-1 908	-1 764
Africa	**3 509**	**3 838**	**9%**	**6%**	**6 260**	**6 401**	**2%**	**10%**	**-2 751**	**-2 562**
North African countries	1 827	2 014	10%	3%	4 037	4 096	1%	7%	-2 210	-2 082
Other African countries	1 683	1 823	8%	3%	2 221	2 305	4%	4%	- 539	- 482
America	**20 542**	**22 187**	**8%**	**36%**	**23 768**	**25 983**	**9%**	**42%**	**-3 226**	**-3 796**
of which:										
Canada	1 648	1 567	-5%	3%	2 042	2 019	-1%	3%	- 394	- 452
USA	16 129	17 623	9%	29%	16 695	18 338	10%	29%	- 566	- 715
Mexico	349	419	20%	1%	727	827	14%	1%	- 378	- 408
Argentina	449	475	6%	1%	308	370	20%	1%	142	105
Brazil	1 055	1 119	6%	2%	865	940	9%	2%	190	179
Asia	**11 134**	**10 277**	**-8%**	**17%**	**8 247**	**8 742**	**6%**	**14%**	**2 886**	**1 535**
of which:										
China	290	390	35%	1%	595	700	18%	1%	- 305	- 309
India	394	421	7%	1%	803	892	11%	1%	- 409	- 472
Japan	4 742	4 357	-8%	7%	1 011	1 153	14%	2%	3 730	3 204
Oceania & Polar Regions	**1 876**	**1 579**	**-16%**	**3%**	**1 632**	**1 772**	**9%**	**3%**	**244**	**- 193**
of which:										
Australia	1 605	1 299	-19%	2%	1 320	1 411	7%	2%	285	- 112
Other	**2 455**	**2 761**	**12%**	**5%**	**1 181**	**1 216**	**3%**	**2%**	**1 274**	**1 545**

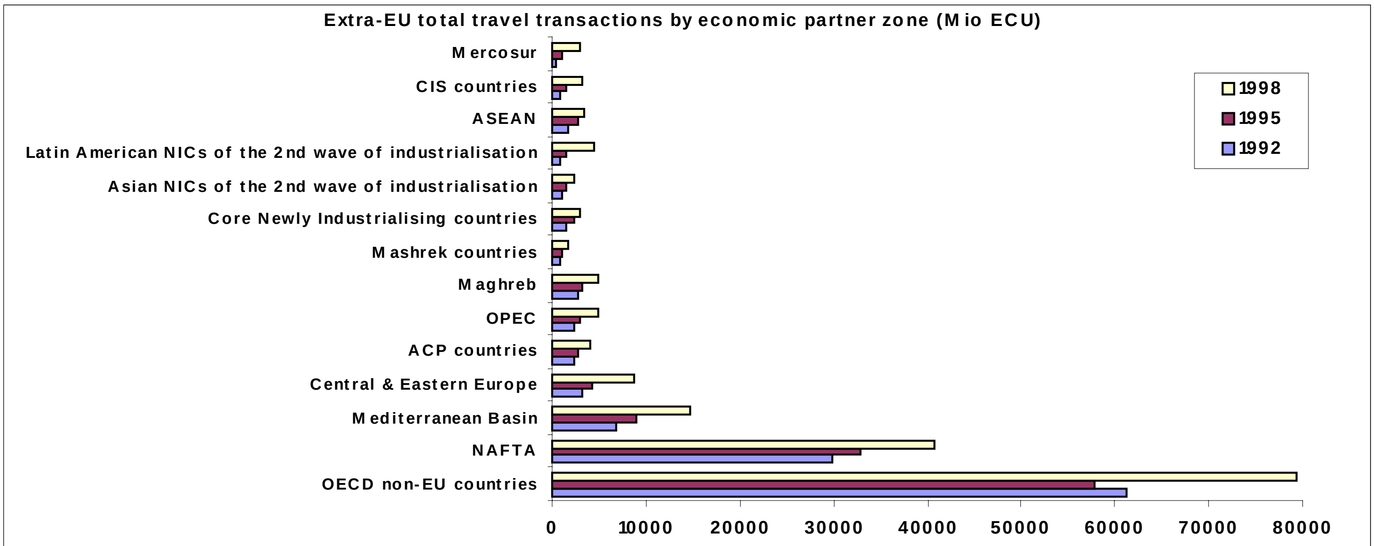
Expansion of tourism activities with the Mediterranean Basin and Other European countries

If the OECD non-EU countries and NAFTA remained the main contributors to extra-EU travel (total travel transactions – exports plus imports – amounted respectively to ECU 79.4 bn and ECU 40.8 bn in 1998), new economic partner zones are emerging.

Tourism receipts earned by the EU from the Mediterranean Basin countries increased from ECU 2.6 bn to ECU 5.1 bn between 1995 and 1998. During the same period, 2.5 multiplied the EU receipts from the CEECs (Central and Eastern European Countries).

Despite this extension of tourism activities, the contribution of these partner zones in the extra EU travel between 1995 and 1998 has not been much improved (in 1998, Mediterranean Basin Countries represented 8% and 15% of the Extra-EU total receipts and expenditures against 6% and 14% in 1995).

The growth of EU's expenditure in the Mediterranean Basin countries (rising from ECU 6.2 bn in 1995 to ECU 9.6 bn in 1998) and CEECs (ECU 2.6 bn in 1995 and ECU 5 bn in 1998) was less important than the growth of the travel expenditure of these zones in the EU.



Tourism, a dynamic sector where small and medium-sized enterprises play an important role but where big groups have an increasing weight

Tourism is considered as one of the most important and fastest-growing sectors of the EU. Accounting in 1998 for 27% of the EU total external trade[8] in Commercial services, this contribution has remained unchanged throughout the decade. Tourism small and medium-sized enterprises (SMEs) are playing a vital role in terms of job creation. In 1997, tourism SMEs represented 7.4% of total SMEs in Europe, 94.2% of which were enterprises employing less than 10 persons. 6.5% of the total turnover of European SMEs is generated by tourism SMEs.

As a proxy indicator concerning employment in tourism activities, and according to the EU Labour Force Survey, hotels and restaurants employed 5.9 million workers in 1998 (4% of the EU total workforce). The Commission (Eurostat and DG Enterprise) is currently estimating the exact impact of tourism on total employment and growth in the EU. The introduction of the Euro, by permitting price transparency and greater cohesion among Europe's regions could strengthened this impact (particularly in less developed and peripheral regions).

Mergers and market shares in the tourism sector**

The European tourism sector experienced recently a wave of mergers, primarily conducted by German, Nordic and British groups. In Germany for example, Preussag took control of TUI in 1998, before acquiring 80% of First Reisebüro (the biggest German travel agencies network) and entering the second British group Thomas Cook. Three Danish travel companies, the Swiss Manta Reisen and the British tour operator Jules Vernes were acquired early March 1999 by the first Swiss company Kuoni, while the first British group Thomson Travel purchased the Norwegian Via Gruppen end June 1999.

In Germany, the 3 main tour operators TUI, NUR and LTU account for 60% of the German market, while Thomson Travel, Airtours and Thomas Cook concentrate 80% of the British market. On the other hand, the situation is rather different in France: the three biggest companies Club Med-Jet Tours, Nouvelles Frontières and FRAM represent only 35% of the package holidays.

Tourism and the GATS: few restrictions on market access

As of September 1998, 112 World Trade Organisation Members have made commitments in Tourism under the GATS. This level is greater than for any other sector, and indicates the desire of most Members to expand their tourism sectors. In the view of the World Tourism Organisation, the tourism sector was already highly liberalised before the Uruguay Round negotiations; few major obstacles remain.

The main mode of supply of tourism and travel-related services is to individuals consuming services in a foreign travel destination. The main specificity of international tourism is therefore the need for private consumers to cross a national border in order to satisfy their demand (in contrast with goods and other services exports). Although certain restrictions on the commercial presence of foreign firms in the EU are recorded, the access conditions are rather liberal in general. Both developed and developing countries have made binding commitments of interest to the European industry.

Nevertheless the number of commitments made varies widely among the sub-sectors part of Tourism and Travel Related Services (e.g. Hotels and restaurants (including catering); Travel agencies and tour operators services; Tourist guides services and Other). If all Members made commitments in the Hotels and restaurants sub-category, 89 out of 112 did so in Travel agencies and tour operator services, 54 in Tourist guides services and 13 only in Other. Nearly half (55 out of 112) of the Members made commitments in three or more sub-sectors.

Finally a certain number of MFN exemptions[9] affecting tourism have been taken by Members, in particular under the Aviation category and concerning preferential access measures for natural persons.

Tourism promotion and revenues

7 EU countries were among the top 10 concerning tourism promotion budgets in 1995. According to the World Tourism Organisation (WTO), the money spent by a country for its promotion is often misdirected and insufficient to face fierce competition between destinations. The amount of these budgets varies widely from a country to one another, and the link between promotion and revenues is not automatic. A few examples provided by the WTO:

While Australia was in 1995 the top spender on tourism promotion at US$88 million, this country earned just US$78 for each dollar spent on promotion. On the other hand, France's revenues amounted to US$375 for each of the US$73 million dedicated to tourism promotion (fourth biggest budget after Australia, Spain and the UK).

Promotional spending accounts for 56% in average of the budgets of National Tourism Administrations. The USA (world's number one earner from international tourism) allocated only US$15 million in 1995, whereas the National Tourism Administrations for France (world's most popular destination country for foreign tourists) received the fifth biggest budget at US$84 million.

[8] *Exports + imports excluding transactions among EU Member States*
[9] *Measures inconsistent with the most-favoured-nation (MFN) principle stipulating that foreign services and services suppliers have to be treated alike*

A typical European holiday maker…***

…Comes from a northern country - Goes away on holiday in August for more than 2 weeks - Stays in France or in Spain (if not in his own country) - Travels with his/her partner - Chooses the sea rather than mountains or countryside - Uses his/her own car - Stays in a hotel or a holiday club - Spends about 2000 ECU for his/her holidays and independently arranges the holidays.

➢ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

- The data used in this issue of Statistics in Focus are from the Eurostat Balance of Payments statistics and Tourism statistics (unless otherwise indicated).

- The Balance of Payments (BOP) of the European Union is compiled as the sum of the harmonised balance of payments accounts of the fifteen Member States. The balance of payments of the EU Institutions is added to the European Union aggregate.

- The methodological framework is that of the fifth edition of the International Monetary Fund (IMF) Balance of Payments Manual (BPM5).

- Travel covers the goods and services acquired from an economy by travellers during visits of less than one year in that economy. Excluded is the international carriage of travellers, which is covered in passenger services under **transportation**.

On the **credit** side (exports), *travel* covers the **receipts** from all goods and services provided by a resident economy to a non-resident staying less than one year in that economy for any other purpose than (i) being stationed on a military base or being an employee (including diplomats and other embassy personnel) of his/her government, or (ii) being an accompanying dependent of an individual mentioned under (i).

On the **debit** side (imports), *travel* records **expenditure** of the same type spent abroad by residents displaying the same characteristics.

Expenditures made in the economy of the employing enterprise by seasonal and border workers are included under *travel*. The one-year rule does not apply to students or patients receiving health care abroad, who remain residents of their economy of origin even if the length of the stay in another economy is one year or more.

The most common **goods and services** entered in *travel* are lodging, food and beverages, entertainment and transport within the economy visited – all of which are consumed within the providing economy – and gifts, souvenirs and articles purchased for travellers' own uses and taken out of the economies visited.

- Eurostat, the World Tourism Organisation and the OECD identify **tourism** as "the activities of those persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes". Similarly, a **visitor** is "any person travelling to a place other than his/her usual environment for less than twelve months and whose main purpose of trip is other than the exercise of an activity remunerated from within the place visited".

- Therefore the BPM5 and the tourism statistics definitions differ as regards **students and medical patients** (considered as residents of their home economies in BPM5, and as visitors in tourism statistics), and the **expenditure of border and seasonal workers** (included under travel in BPM5, but excluded in tourism statistics which does not consider as visitors all individuals who move to another economy primarily for the purpose of earning income).

- Arrivals: In tourism statistics one person visiting the same country several times during the year is counted each time as a new arrival. Likewise, the same person visiting several countries during the same trip is counted each time as a new arrival.

- Definition of the acronyms of the economic zones or agreements:

EFTA: European Free Trade Association (Iceland, Liechtenstein, Norway and Switzerland).
OECD: Organisation for Economic Co-operation & Development (29 countries).
NAFTA: North American Free Trade Association (Canada, Mexico and USA).
Mercosur: Countries of the South Cone commonmarket (Argentina, Brazil, Paraguay and Uruguay).
ASEAN: Association of South-East Asian Nations (10 countries).
OPEC: Organisation of Petroleum Exporting Countries (12 countries).
CIS: Community of Independent States (12 countries).
ACP: African, Caribbean and Pacific countries signatories of the Lomé convention (70 countries).
Mashrek countries: Egypt, Jordan, Lebanon, Syria and Palestine.
Maghreb countries: Algeria, Morocco and Tunisia.
Core Newly Industrialising Countries (NICs1): Hong Kong, republic of Korea, Singapore and Taiwan.
Asian NICs of the 2nd wave of industrialisation (NICs2A): Malaysia, Philippines and Thailand.
Latin American NICs of the 2nd wave of industrialisation (NICs2LA): Argentina, Brazil, Chile and Mexico.
GATS: General Agreement on Trade in Services.

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- Community Methodology on Tourism Statistics; Eurostat.
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- ***Facts and figures on The European on holidays 1997-1998; European Commission DG Enterprise.

Further information:

➢ Reference publications

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