

2.7. TOURISM

Tourism is one of Europe's fast-growing sectors and is an increasing source of pressure on natural resources and the environment. The main pressures come from transport, the use of water, land and energy, infrastructure, buildings and facilities, pollution and wastes, and the increasing number of second homes. In some popular destinations, these pressures have resulted in irreversible degradation of the local environment.

Tourism is the main driver behind the apparently inexorable increase in the demand for passenger transport, with its associated environmental impacts. This demand is expected to continue to grow, including a doubling of air traffic. Cars and planes, the most environmentally-damaging modes, remain the most-used forms of transport.

Vacation patterns are changing, with more vacations, particularly short breaks; people are travelling more often, for shorter stays and further from home. The seaside and mountains remain the favourite destinations. Tourism is taking a growing share of household expenditure as prices continue to fall.

There has been limited progress in the implementation of policies for more sustainable tourism, with minimal penetration of schemes such as eco-labelling.

2.7.1. Introduction

Tourism in Europe is increasingly seen as a sector that interacts strongly with issues and problems such as transport, environment, regional planning, energy, trade and business, and information technology. The sector is highly fragmented and has long been regarded as a local management issue. Until recently, there has been little policy attention at the national and European levels and little realisation of the need for more sustainable management.

Different European countries have different institutional frameworks for tourism, from regional boards to State Ministries, and some programmes that are designed to encourage sustainable tourism are being developed. However, most of the environmental measures that have so far been implemented have been initiated by major tour operators and local stakeholders and are based on voluntary approaches. There are examples of good practices in many countries (e.g. Spain, France, the UK and Switzerland) but most remain marginal (e.g. eco-label schemes or eco-taxes). There is a general lack of broad environmentally-integrated strategies for the sector.

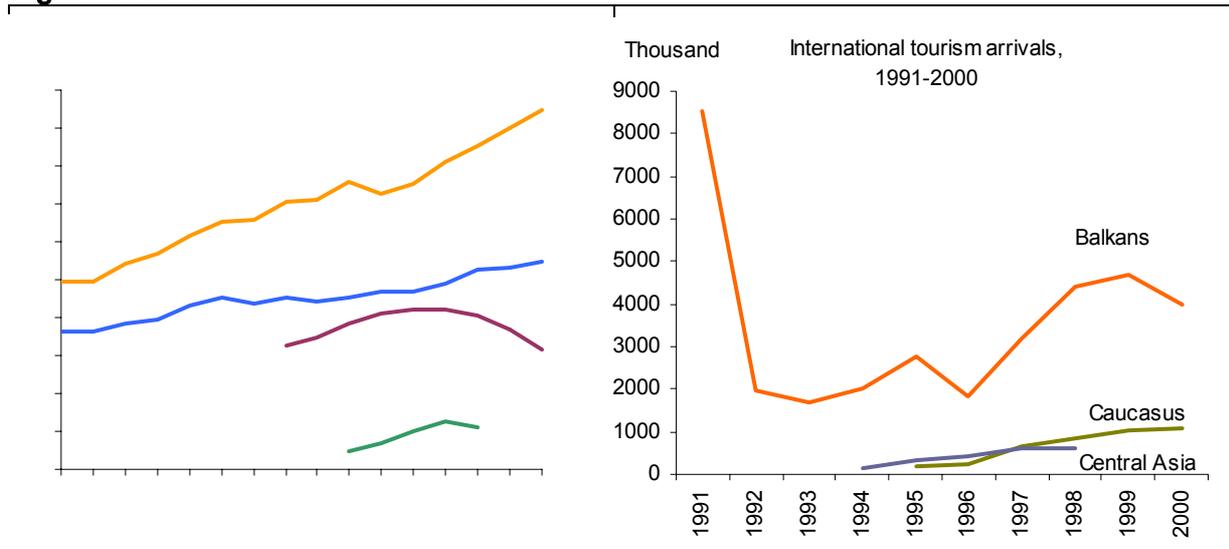
The tourism industry recognises the need to maintain its main assets, for example the attractiveness of destinations. It is now generally recognised that tourism will be a successful industry only if it is managed in an ecological and sustainable manner. At the international level, the UN Commission on Sustainable Development and the Convention on Biological Diversity have targeted tourism as a priority policy area. At the inter-regional level, the Mediterranean countries, the Alpine countries and the Baltic countries have initiated actions to promote sustainable tourism. The EU Council adopted a Resolution in May 2002 on the need to improve the coordination of policies that affect tourism. An Agenda 21 programme includes an integrated evaluation of tourism activity throughout the EU, the development of an integration strategy for the sector, and the elaboration of harmonised indicators of sustainable development for tourism.

2.7.2. Major tourism patterns

2.7.2.1. Growth in demand

Tourism is an important industry in Europe; the region has long been the world's favourite tourist destination, with almost 60 % of the world market share. International arrivals are expected to grow by 50 % to around 720 million per year by 2020, with a doubling of air traffic in Europe. In the EU, the sector represents 30 % of total external trade in services, 6 % of employment and contributes 7 % of GDP (12 % if indirect effects are included).

Figure 1. International tourism arrivals



Note: Here and throughout this chapter, *North Western Europe (N-W Europe)*: Austria, Belgium, Denmark, Finland, Germany, Iceland, Ireland, Liechtenstein, Luxembourg, The Netherlands, Norway, Sweden, Switzerland, and UK.

South Western Europe (S-W Europe): France, Greece, Italy, Portugal, and Spain.

Central Asia: no data available for Tajikistan and Kazakhstan.

Source: World Tourism Organisation

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☺ 390 million foreign tourists visited Europe in 2000, 56 % of the world's tourism market. Tourist arrivals in Southern Western Europe increased by 91 % between 1985 and 2000.

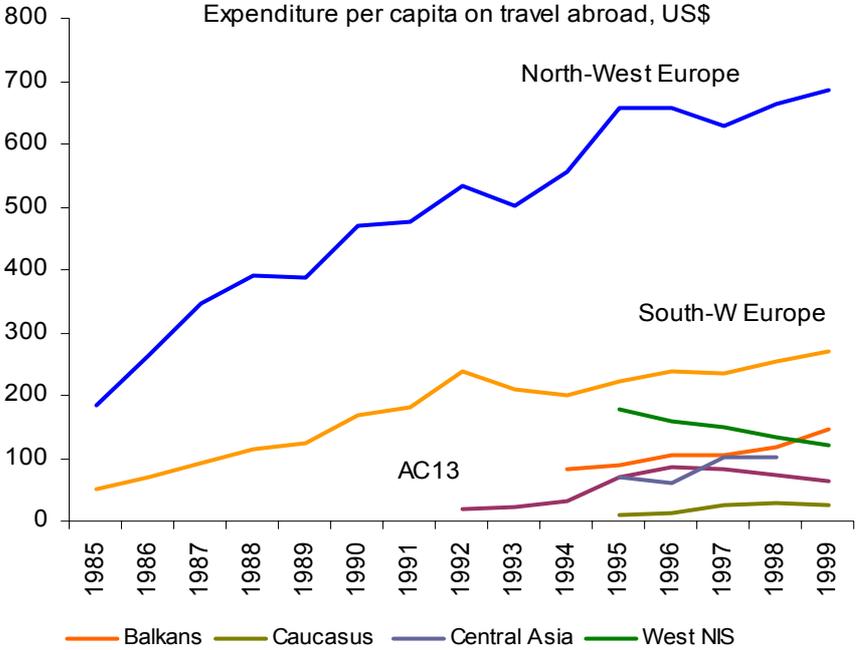
During the past two decades, international tourism in Europe increased by an average of 3.8 % per year; the World Tourism Organisation (WTO, 2001) forecasts an annual increase of 3.1 % over the period 1995-2020, which is one percentage point more than the anticipated economic growth. France, Spain and Italy already accounted for 24 % of the world's total arrivals in 1999, and there is no reason to expect this share to fall. At the same time, some other regions are becoming more attractive as a result of economic transition and the opening of borders, with a huge potential for tourism development. The biggest growth (4.8 % per year up to 2020) is expected in Central and Eastern Europe. Poland, the Czech Republic, Hungary and Turkey accounted for 81 % of CEE arrivals in 1999. The NIS recorded the biggest growth over the period 1995-1999, with tourist arrivals approximately doubling.

However, most tourist trips are not international, but within the country of origin. In 1995, WTO estimated that total domestic tourist arrivals numbered about 5.6 billion worldwide, with 567 million tourists travelling outside their own country (699 million in 2000). Domestic tourism accounts for 20 to 90 % of all tourist trips in Europe, from less than 20 % in Luxemburg, Croatia, and the Czech Republic to around 90 % in Germany,

Finland and Romania. More development of this form of tourism is expected due to increasing welfare levels in all countries.

2.7.2.2. Tourism expenditure

Figure 2. Tourism expenditure on travel abroad (excluding international transport)



Note: No data available for Bosnia-Herzegovina, Yugoslavia, Russian Federation, and Turkmenistan.

Source: World Tourism Organisation

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☺ Tourism expenditure for travelling abroad increased by 7 % between 1995 and 1999 in Europe

Many factors affect the demand for tourism, including increases in time for leisure activities and their social importance, economic growth, and changes in demographic factors, behaviour and expectations. While the choice of destination remains determined mainly by scenery and climate, tourists are becoming more interested in higher quality tourism experiences, particularly in cultural, historic and natural sites. During recent years, the length of vacations has increased, which gives more time for tourism and leisure. Europeans now take multiple holidays rather than extending the length of their main holiday. In the Netherlands for instance, the average number of vacations per person increased from 1.21 to 1.71 between 1966 and 1997, and the number of short breaks became twice the number of long vacations. UK residents who travel within their own country spent 4.1 nights away from home on average in 1989 and 3.6 nights in 1997; most tourists (70 %) now take short holidays (less than 4 nights). In France, the decrease in working hours, from 39 to 35 hours, has resulted in more days for holidays. There have been similar developments in several other European countries. In 1997, European tourists chose the sea (63 %), mountains (25 %), cities (25 %) and the countryside (23 %) as holiday destinations (European Commission, 1998).

The fall in average tourism prices has resulted in more journeys per person per year. As people become more affluent and the relative costs of travel and holidays fall, tourism is taking a larger and larger share of household expenditure (currently an average of about 9 %). According to the Swiss Federal Statistical Office, half of expenditure by Swiss citizens on transport, meals and beverages in 1998 was for leisure. The growth in tourism

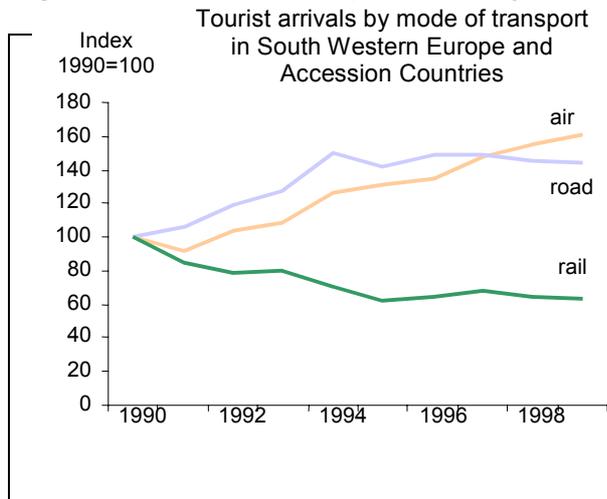
expenditure by households results mainly from the increase in transport, which accounts for the largest share of tourism expenditure (for tour packages, about 45 % of the overall cost is for travel and 37 % for accommodation) (Eurostat, 2000).

2.7.3. Tourism and the environment

2.7.3.1. Transport

The most important regional environmental impact of tourism is from the associated transport (see chapter xx). Travel to and from destinations is responsible for 90 % of the energy used by the sector. In the EU, tourist travel represents 9 % of total passenger travel (including business travel, which constitutes 25-30 % of total passenger-km), and about 70 % of air transport is for holiday travel. For the whole EU, holiday transport is responsible for half of all passenger transport energy use, and 11 % of the overall energy consumption of the transport system (including freight). In France, transport for domestic tourism contributes 5 to 7 % of all greenhouse gas emissions. As tourism is growing more rapidly than overall traffic, the associated problems are likely to increase.

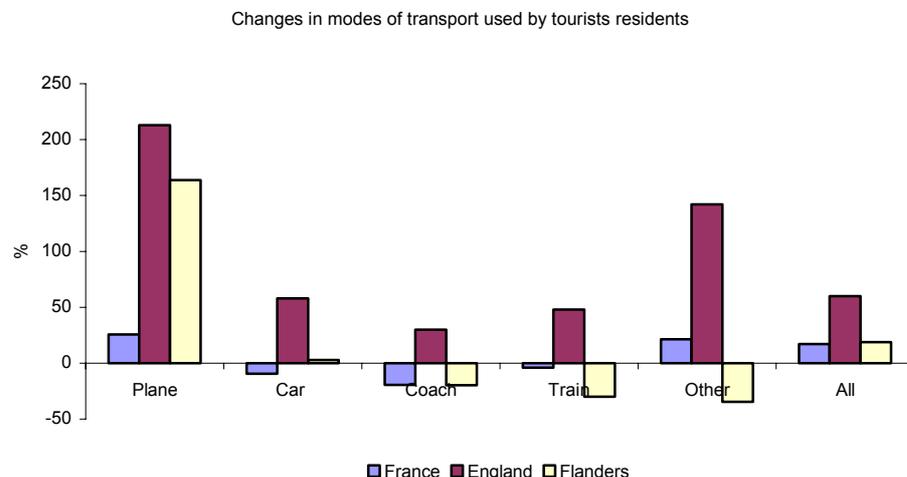
Figure 3. Modes of transport used by international tourists



Note: AC13 excludes Estonia, Latvia, Lithuania, Slovakia, and Slovenia.

Source: World Tourism Organisation

Figure 4. Changes in modes of transport used for tourism by residents



Notes: France: All tourism trips (holidays and business) by residents, 1994-1998; England: All holiday's trips by UK residents in England, 1990-1999; Flanders: Long holiday's trips (more than 3 nights) by residents, 1991-2000

Sources: France: Direction du Tourisme / Sofres – cited in IFEN 2000; England: United Kingdom Tourism Survey 1999 – cited in English Tourism Council 2001; Flanders: WES – cited by VMM in MIRA 2001

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☺ Tourist travel continues to grow and is increasingly dominated by road and air transport, the most environmentally-damaging modes.

The car offers a high degree of freedom for holidays and has also become cheaper relative to public transport than it was 20 years ago, giving it a special attractiveness for holiday travel. 340 million tourists arrived by road in the South Western and Accession countries in 1999. The modal shares of international tourist travel to South Western European countries in 1997 was 61 % road, 30 % air, and only 4 % rail, putting especially high pressure on some areas. For example, up to 80 % of all tourist journeys to the Alps, where public transport is crucially lacking, are by car. In the Accession countries, 92 % of visitors come by road although the region has good access by train. Tourist travel is also highly concentrated in time, and the resulting seasonal saturation of road transport infrastructures often leads to decisions to supply more infrastructures and services.

Although most air travel remains relatively short-distance, long-haul travel is the most rapidly developing form of tourist travel, both in absolute and percentage terms. There were 80 million arrivals by air in the South Western and Accession countries in 1999 (20 % of all arrivals), an increase of 60 % from 1990.

Of the 2 200 million day-trip journeys by UK tourists in 1998, the share of the train reached less than 5% (10% for overnights trips) while the car share remained above 80 %. The UK tourist trips in England increased by 60 % between 1990 and 1999, with air transport increasing by 213 %. Some sub-regions of the British rail network are already running at 90 % of capacity and most routes out of London will reach the same level by 2011 (*English Tourism Council, 2001*). There are similar developments in many countries and for all transport systems. Routes of strategic importance for tourism will need to be further considered if the transport system is to cope with the continuous growth of tourist flows expected during the next 10-20 years.

Travel patterns are changing: tourists are travelling more often, for shorter stays, and further from home, and the average round-trip is getting longer than that for other purposes. In France, for example, the annual average distance travelled for tourism is 917 km per capita compared with 770 km for other purposes. The average person in the EU makes 0.8 tourist trips per year, travelling about 1800 km; both these figures are likely to increase, with increasing impacts on the environment and on 'normal' traffic conditions.

2.7.3.2. Destinations

The direct local impacts of tourism on people and the environment result from the intensive use of water and land, the delivery and use of energy, changes in the landscape from the construction of infrastructure, buildings and facilities, water and air pollution and wastes, the compaction and sealing of soils (damage and destruction of vegetation), and the disturbance of local people and fauna (e.g. noise). Some conflicts may also arise between tourism development and other sectors such as agriculture and forestry. The uncontrolled development of tourism over recent decades has led to a dramatic degradation of the quality of environment, especially around the Mediterranean and in the Alps. About 35 % of international tourist trips by Europeans are to the European Mediterranean countries (mostly in coastal areas) and 8 % to the Alps.

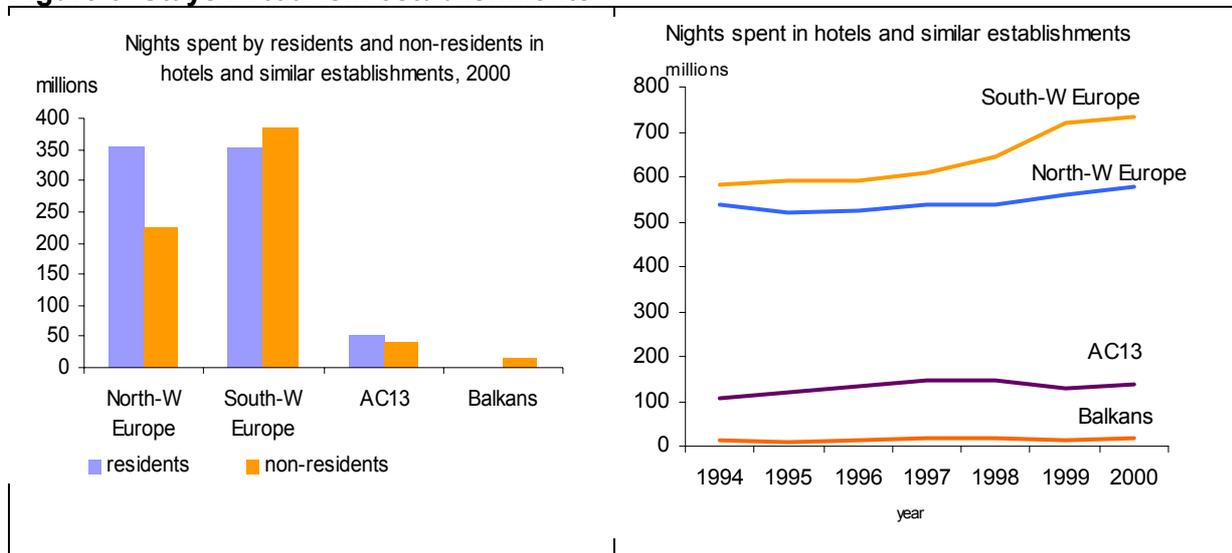
In 1990, it was estimated that nearly 135 million tourists (international and domestic) visited the Mediterranean coasts, doubling the local population. The coastal strip (500 m from the shore) of Majorca, one of the most popular destinations, already had 27 % of its area urbanised in 1995. The highly seasonal nature of tourism and its increasing

concentration in environmentally-sensitive areas has made some destinations victims of their own attractiveness. It is estimated that tourism contributes 7 % of all pollution in the Mediterranean.

The overuse of water by hotels, swimming pools, and golf courses is of particular concern in the Mediterranean and other regions where water is scarce. Tourists consume around 300 litres (luxury tourism 880 litres) and generate 180 litres of wastewater per day. In the Balearic Islands, the peak affluence of tourists during July was evaluated to 20 % of the overall local population over one year, and the volume of this affluence increased by around 80 % between 1994 and 1999. In the Rimini Province (Italy), water use during summer is 40 % of the annual water consumption of municipalities; the production of wastes and wastewater in summer period is three times higher than in wintertime, leading to some management problems.

The Alps are the second most favoured destination, mainly because of the skiing facilities. The tracks of the heavy equipment that tend the ski runs erode the thin topsoil on which the vegetation cover depends.

Figure 5. Stays in tourism establishments



Note 1: Data on Residents in Balkans is of 3.8 millions. No data available for Cyprus, Turkey, Malta and Yugoslavia.

Note 2: Data include residents and non-residents. No data available for Malta and Yugoslavia.

Source: Eurostat

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☺ In 2000, 58 % of all nights spent by tourists in the EU were in hotels (around 90 % in Cyprus and Turkey). Hotels are the form of accommodation that has the least environmental impact and have the highest occupation rate (they are occupied for 40 % of the year on average in most countries).

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☺ Construction of second homes is increasing rapidly (by 10 % in France between 1990 and 1999), creating more intensive pressures on land and the environment, especially in coastal and mountain zones.

Accommodation (80 % of all tourism and leisure equipments) is a major source of impacts, particularly on water resources, land use and ecosystems. Hotels appear to be the form of accommodation with the least impact, but they are high consumers of water, as a tourist staying in hotel uses on average one third more per day than a local inhabitant. Energy consumption per m² per year by a one star hotel is 157 kWh (380 kWh in a four

star hotel). Some tourism businesses are starting to implement energy efficiency measures, for example hotels in UK 'saved' up to 9 thousands of tonnes of carbon dioxide per year each between 1997 and 1999. Campsites are supposed to be a reversible form of land use, but water supply, sewage and waste disposal problems can arise if the infrastructure is not designed to cope with peak periods.

The growth in the number of second homes during the 1990s constitutes another major problem. The land area required by such a home, per person, is 40 times that for a flat and 160 times that for an 80-bed hotel (20 times when garden areas are excluded). Most construction is in coastal zones, and natural, rural and skiing areas. In Sweden, about one third of second homes are 100 meters from the shore. In France, the world's top tourist destination, almost 335 000 new second homes have been built during the past two decades, covering more than 22 million m² of land; second homes now represent 73 % of total lodging capacity, and 18 % of all nights spent by residents in 1999 were in their second home. Moreover, most second homes are seldom used: often only 2 weeks a year compared to more than 20 weeks for hotels. In Portugal, some families travel every summer weekend to a second home, at a considerable distance (more than 200 km).

The continuing demand for high quality, luxurious and comfortable accommodation is expected to result in a steady growth in the number of holidays spent in hotels and second homes.

2.7.4. Management policies

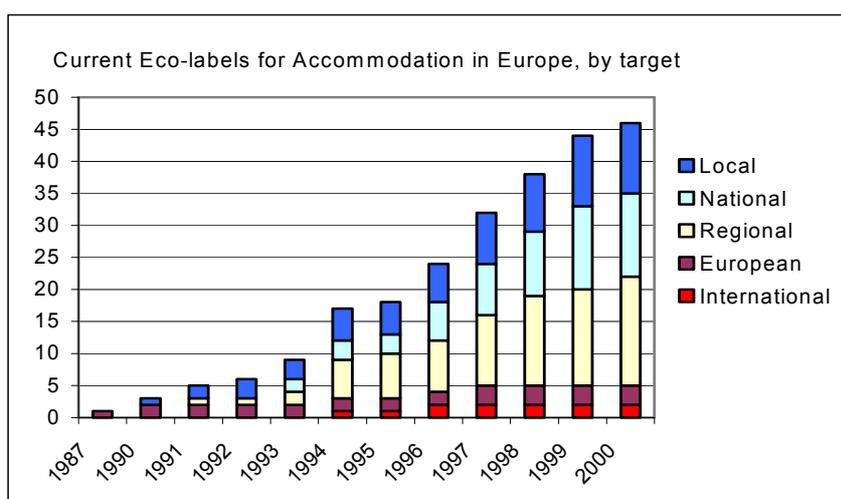
Progress in addressing the sustainable development of tourism is mainly at the sub-regional level, generally with a regulatory approach in the South Western European countries and a more market-based approach in the North Western countries, through voluntary agreements and eco-labelling schemes. At the inter-regional level, tourism is covered by the Mediterranean Commission for Sustainable Development, the Additional Protocol to the Alpine Convention on tourism, and the Agenda 21 for the Baltic Sea region.

Most policy developments at the local level are through Local Agenda 21, with up to 35 % of the European municipalities committed to plans that stress tourism as a priority (ICLEI, 1997).

Vital public/private sector collaborative links are developing at a number of leading destinations. Hoteliers and other tourism businesses could play a significant role in the development of sustainable tourism and benefit directly from environmental initiatives but very few have adopted environmental management systems.

Eco-labelling has shown some potential but its use, while growing, remains small (e.g. 0.1 % penetration in Austria). Recent surveys suggest that many people would pay extra for accommodation that was part of a green accreditation scheme.

Figure 7: Current Ecolabels for accommodation in Europe



Source: ECOTRANS e.V, ECO-TIP database.

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☺ There has been a significant increase since 1990 in the use of eco-labels for tourism at the national and sub-regional level but implementation remains marginal.

Economic instruments such as environmental taxes are used in some countries, with visitors paying direct and indirect taxes on tourism products and services, but the revenues are not generally directed to environmental protection or improvement. At the same time, popular destinations receive special subventions from the State for tourism infrastructures. The Balearic Islands levy an eco-tax on hotel stays (box xx) and a tax on passenger transport to small islands is levied in France.

Box: Tourism eco-tax in the Balearics Islands

Almost 11 million people arrive at the Balearic Islands in Spain each year, compared with a permanent population of only 760 000. The tourists contribute significantly to the local economy, but there are social and environmental costs. The regional government wants to move to a more sustainable form of tourism and plans to finance its programme through a tax on hotel stays. From May 2002, tourists will be charged one euro per night eco-tax on all hotel bills. The 24 million euros that this is expected to raise in the first year will be spent on environmentally-friendly projects. The hotel industry was called to cooperate in the new measure's introduction when it appeared that the tax enjoys strong support among residents. Tourists appear to agree with the aim of the tax once it is explained to them. Source: <http://www.caib.es>

2.7.5. References and further reading

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