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# Tourism consumption and interregional economic impacts in Italy

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## Keywords

Tourism, Economic indicators, Italy

## Abstract

This paper analyses the consumption habits of tourists coming from different origins and choosing Italy as a holiday destination, in terms of expenditure level and composition. The economic role of both international and domestic demand and the plot of interactions going from tourist expenditure behaviour to the tourism industry have been measured. Furthermore, the impacts which localised expenditure (total and by item) can generate in each regional economic system are discussed, and estimates of the "centralising" and "leakage" effects are presented. The balance between these effects selects the net centralising regions of economic benefits deriving from tourism demand localised everywhere, with respect to those regions producing a net leakage of the positive effects generated by the demand localised in them.

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## Introduction

Italy is one of the leading destination countries in the world; in fact it adds up to 35 million of international arrivals and 120 million nights. In terms of receipts it accounts for around US\$30 billion, gaining the second position among the world's top 15 tourism earners. Despite the crucial role of tourism in the Italian economy, economic analyses are lacking mainly in the field of tourism demand segmentation and regional estimate of the impacts. This paper contributes to the overcoming of this lack by describing and measuring international and domestic tourists' consumption behaviour, the economic dimension of each segment, the performance of the local tourism industry and its dependence on the structure and the characteristics of these segments. Furthermore, the effects which localised expenditure can generate on the economic system of other areas of the country, even the most distant, are discussed. The analysis here presented, carried out for 1997, discusses issues such as: which typologies of visitors express a consumption behaviour which is able to stimulate the whole production system most; to what extent those economic benefits stay inside the area that has received the tourist and to what extent, on the contrary, they disperse outside it.

These links can be explained using a multiregional-multisectoral input-output model. The case of Italy has been studied by implementing an input-output model *à la* Chenery-Moses, that has been performed for the year 1997 (Manente, 1999).

The following section (Tourists' expenditure in Italy) describes international and domestic tourism expenditure, while the subsequent sections (Value added and employment generated by tourism, and

Tourism and the balance of payments) present the impacts in terms of value added, employment and balance of payments at a national level. Finally, the last section analyses the interregional effects.

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## Tourists' expenditure in Italy

Total tourism consumption in Italy in 1997 amounted to EURO 67.8 billion. Of these, 38.6 per cent (EURO 26.2 billion) were spent by international tourists and 61.4 per cent (EURO 41.6 billion) by domestic tourism. Other conditions being equal, the amount and the composition of the expenditure mix tend to modify, first of all, according to typology of holiday chosen and tourists' habits. Concerning the latter, the distinction per nationality outlines clear distinctive features. The pattern of expenditure in Table I stresses the role of "Hotels, bars and restaurants" (26.1 per cent for domestic tourism expenditure and 44.3 per cent for international consumption) and "Other market services" (21.8 per cent for domestic tourism expenditure and 14.9 per cent for international consumption), including recreational activities and lodgings. The role of agrifood is relevant too: 11.7 per cent for domestic tourism expenditure and 7.2 per cent in terms of international expenditure. Important items for domestic tourism are agriculture (2.9 per cent), meat products (3.3 per cent) and other food products (3.3 per cent). The preference for extra-hotel accommodation and the lower use of upper class hotels justify these results and explain why the food industry and agriculture register a percentage of domestic tourist expenditure higher than the international one.

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## Value added and employment generated by tourism

The value added generated directly and indirectly by tourism consumption in 1997 in



**Table I**

International and domestic tourism consumption by productive sectors, Italy 1997

Production sectors	Absolute values (EURO billion)			% values		
	International tourism consumption	Domestic tourism consumption	Total	A	B	C
	A	B	C = A + B	A	B	C
<b>1. Agriculture</b>	0.48	1.19	1.67	1.8	2.9	2.5
<b>2. Energy</b>	1.18	2.04	3.22	4.5	4.9	4.8
<b>3. Meat products</b>	0.52	1.36	1.88	2.0	3.3	2.8
<b>4. Dairy products</b>	0.26	0.68	0.94	1.0	1.6	1.4
<b>5. Other food products</b>	0.52	1.37	1.89	2.0	3.3	2.8
<b>6. Beverage</b>	0.10	0.26	0.36	0.4	0.6	0.5
<b>7. Other manufactured products</b>	3.86	6.92	10.78	14.7	16.6	15.9
<b>8. Construction</b>	0.04	0.12	0.16	0.2	0.3	0.2
<b>9. Hotels, bars, restaurants</b>	11.61	10.87	22.48	44.3	26.1	32.7
<b>10. Trade services</b>	3.11	6.47	9.58	11.9	15.6	14.2
<b>11. Transport, communication</b>	0.57	1.14	1.71	2.2	2.7	2.5
<b>12. Credit, insurance</b>	0.05	0.08	0.13	0.2	0.2	0.2
<b>13. Other market services</b>	3.90	9.07	12.97	14.9	21.8	19.3
<b>14. Non-market services</b>	0.01	0.01	0.02	0.0	0.0	0.0
<b>Total</b>	26.21	41.57	67.78	100.0	100.0	100.0

Italy was EURO 57.6 billion, 38.9 per cent of which (EURO 22.4 billion) was generated by international tourism demand. Moreover, it accounted for 5.7 per cent of the total national value added. The multiplier effect has been estimated to be 1.48 for domestic tourism and 1.56 for international demand.

Different levels and sector composition of the impacts correspond to the different mix of goods purchased by the two segments of demand, to the different trends of the average expenditure per night and to the different structure of the total consumption that characterise them. Then, going on with the sector breakdown, it is not surprising to find that two categories – “Hotels, bars and restaurants” and “Other market services” – account for 48.3 per cent of tourism value added (22.3 per cent and 26.0 per cent respectively). Therefore, the relative importance of the remaining sectors which are not thought of as being strictly tourism-related is notable. With special emphasis on the agrifood sectors, in fact, Table II indicates that 7.5 per cent of the tourism value added has been produced directly and indirectly by agriculture and 4.3 per cent by the food sector.

Furthermore, multiplier analysis stresses the fact that the agriculture sector generates the strongest multiplier effects (4.7 compared to the national average of 1.5).

The direct and indirect employment effects of tourism are expressed in annual full-time job equivalent and can be seen in Table III.

In 1997 an estimated 1,999,000 jobs, 9 per cent of employment in Italy in that year, were the total result of tourism. The international

tourism demand generated 38.8 per cent of the total jobs. Finally, the multiplier effect is 1.23 for both the components, international and domestic.

The sector breakdown confirms the role of the core sectors of the tourism phenomenon, the importance of agriculture (11.3 per cent of total tourism employment) and the higher level of activation of the agrifood sectors induced by domestic tourism consumption.

### **Tourism and the balance of payments**

Trends in the tourism current account have to be set in the context of the overall picture of a serious deterioration of the overall position between the mid-1980s and early 1990s. The corner was turned in 1993. Both trade and tourism were significant contributors to this. The surplus on the tourism account almost doubled between 1993 and 1997, from EURO 6.4 billion to EURO 11.7 billion. The drains on the current account were net indirect taxation and net revenues from abroad. There were, however, signs of improvement on both fronts in 1997. Net transfers, which at one time were one of the positive elements in the balance of payments, are now permanently in the red.

The positive tourism balance in 1997 was attributable to favourable trade terms on major markets and the depressive effect on outbound tourism of sluggish domestic economic performance. Comparison with other major sectors of the economy shows how sensitive the Italian trade balance is to

**Table II**

Tourism added value by sector generated by international and domestic tourism consumption, Italy 1997

Production sectors	Absolute values (EURO billion)			% values		
	International tourism consumption	Domestic tourism consumption	Total C = A + B	A	B	C
	A	B	C = A + B	A	B	C
1. Agriculture	1.61	2.73	4.34	7.2	7.7	7.5
2. Energy	0.74	1.15	1.89	3.3	3.3	3.3
3. Meat products	0.16	0.27	0.43	0.7	0.8	0.7
4. Dairy products	0.09	0.17	0.26	0.4	0.5	0.5
5. Other food products	0.52	0.79	1.31	2.3	2.2	2.3
6. Beverage	0.21	0.25	0.46	0.9	0.7	0.8
7. Other manufactured products	2.28	3.76	6.04	10.2	10.7	10.5
8. Construction	0.20	0.40	0.60	0.9	1.1	1.0
9. Hotels, bars, restaurants	6.41	6.60	13.01	28.6	18.7	22.3
10. Trade services	3.65	6.42	10.07	16.3	18.2	17.5
11. Transport, communication	1.32	2.22	3.54	5.9	6.3	6.2
12. Credit, insurance	0.28	0.49	0.77	1.2	1.4	1.3
13. Other market services	4.90	10.01	14.91	21.9	28.4	26.0
14. Non-market services	0.00	0.00	0.01	0.0	0.0	0.0
<b>Total</b>	<b>22.37</b>	<b>35.25</b>	<b>57.62</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

**Table III**

Tourism employment by sector generated by international and domestic tourism consumption (full-time job equivalent units), Italy 1997

Production sectors	Absolute values (000's)			% values		
	International tourism consumption	Domestic tourism consumption	Total C = A + B	A	B	C
	A	B	C = A + B	A	B	C
1. Agriculture	83.3	142.3	225.6	10.7	11.6	11.3
2. Energy	11.2	17.7	28.9	1.4	1.4	1.4
3. Meat products	3.5	5.7	9.2	0.5	0.5	0.5
4. Dairy products	1.9	3.6	5.5	0.2	0.3	0.3
5. Other food products	11.1	16.9	28.0	1.4	1.4	1.4
6. Beverage	4.6	5.5	10.1	0.6	0.5	0.5
7. Other manufactured products	51.6	86.8	138.4	6.7	7.1	6.9
8. Construction	7.9	16.6	24.5	1.0	1.4	1.2
9. Hotels, bars, restaurants	267.5	285.4	552.9	34.5	23.3	27.4
10. Trade services	151.6	278.1	429.7	19.5	22.7	21.6
11. Transport, communication	33.2	56.5	89.7	4.3	4.6	4.5
12. Credit, insurance	4.4	7.7	12.1	0.6	0.6	0.6
13. Other market services	144.0	300.2	444.2	18.6	24.5	22.4
14. Non-market services	0.2	0.2	0.4	0.0	0.0	0.0
<b>Total</b>	<b>776.0</b>	<b>1,223.0</b>	<b>1,999.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

the exchange rate. When the lira was particularly strong in the early 1990s, the trade balance was in deficit and the tourism surplus dropped sharply. In 1996 and 1997, on the other hand, there was a very significant trade surplus and a solid surplus on the tourism account. Until 1994, there was a narrowing gap between foreign tourist expenditure in Italy (a form of export) and Italian tourist expenditure abroad (a form of import). This gap has stabilised since then because Italian outbound tourism has been

stagnating. Expenditure by outbound tourists started to take off again in 1997, not because numbers were increasing, but because individual expenditure rose. In real terms, therefore, the tourism balance has started to decline after peaking in 1995. 1995 also represented a watershed year in terms of the cost of a holiday in and outside Italy. Up till then the prices of goods and services bought by visitors to Italy were increasing faster than the domestic consumer price index, while outbound visitors were

struggling to cope with the impact on the cost of their purchases of a falling lira. The situation has since been reversed in both cases. Similar patterns occur in the volume of purchases.

A truer picture of the impact of tourism on the current account than the official figures provide is the nature of the tourism balance exclusive of the imports needed to sustain tourism. For every seven lire of foreign exchange earned from tourism, nearly one goes to finance the necessary imports: a ratio of EURO 3.4 billion to 26.2 billion in 1997. Take the expenditure of outbound Italians of 14.5 billion from this and the net tourism balance drops to 8.3 billion (Table IV). Most of the imports required for the tourism industry are of industrial products. They account for 77 per cent of the total, followed by energy (14.3 per cent) and agricultural goods (8.1 per cent). The percentages are 62.5 per cent, 15.2 per cent and 12.3 per cent if the indirect effects of tourism are taken into account. Foreign tourists have a lesser impact on food imports than domestic tourists, but generate more demand for energy (Table V).

**Table IV**

Net contribution to the tourism account of consumption in Italy of non-residents (CINR) and consumption externally of residents of Italy (CERI) 1996/1997 (EURO billion)

	Receipts (CINR) (1)	Expenditure (CERI) (2)	Balance (3) (1) - (2)	Tourism related imports (4)*	Net receipts (5) (1) - (4)	Net contribution (6) (3) - (4)
<b>1996</b>	23.9	12.5	11.4	2.9	21.0	8.5
<b>1997</b>	26.2	14.5	11.7	3.4	22.8	8.3

**Note:** \*Direct and indirect imports needed to meet foreign tourism demand (CINR)

**Source:** Ciset and IRPET from data in *Relazione Generale sulla Situazione Economica del Paese* (1998)

**Table V**

Imports by sector directly and indirectly dependent on tourism, 1997 (EURO billion)

	Directly induced by tourist consumption			Directly and indirectly induced by tourist consumption		
	Non-residents	Italians	Total	Non-residents	Italians	Total
	(a)	(b)	(a+b)	(a)	(b)	(a+b)
<b>Agriculture</b>	0.11	0.26	0.37	0.42	0.70	1.12
<b>Energy products</b>	0.24	0.41	0.65	0.54	0.85	1.39
<b>Manufactures</b>	1.19	2.29	3.49	2.08	3.62	5.70
<b>Construction</b>	0.0	0.0	0.0	0.0	0.0	0.0
<b>Commerce, hotrec.</b>	0.01	0.02	0.03	0.15	0.27	0.42
<b>Transport/commerce</b>	0.0	0.0	0.0	0.04	0.07	0.12
<b>Banking/insurance</b>	0.0	0.0	0.0	0.04	0.07	0.11
<b>Leasing/rental</b>	0.0	0.0	0.0	0.10	0.16	0.26
<b>Services not for sale</b>	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	1.55	2.98	4.53	3.37	5.75	9.12

**Source:** Ciset and IRPET

### Italian competitiveness on the main origin markets

An improvement in Italian competitiveness relative to its main markets can be seen by use of a specially constructed index of tourism products and its impact on the main origin markets (Table VI). This is weighted by the number of nights spent in each destination country relative to total foreign bed nights. The weighting is updated every five years. The base currency is the dollar. The lower the index level, the greater Italy's competitiveness. Italy's relative position was very difficult in the early 1990s, but has improved considerably, particularly in relation to the United States and Japan. Italy is feeling the dual benefits of a more competitive rate of exchange and lower inflation.

### Interregional-intersectoral effects

The interregional effects are explained in Table VII. Made up of ten lines and ten columns, one for each macro region, it describes:

**Table VI**

Italian competitiveness on the leading international origin markets

Years	Austria	Switzerland	Germany	UK	France	USA	Canada	Japan
1985	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
1986	107.5	105.1	103.1	104.4	108.8	116.7	109.7	109.4
1987	108.9	106.4	103.3	105.4	110.5	121.2	112.0	111.7
1988	107.2	105.4	102.3	103.9	104.8	115.9	107.5	108.3
1989	110.3	108.3	105.5	104.7	106.1	115.2	111.0	110.5
1990	111.7	106.3	104.8	103.4	106.0	124.6	112.6	119.3
1991	112.3	111.2	107.9	107.6	107.1	123.2	112.0	119.4
1992	107.6	109.0	106.8	109.5	107.9	130.4	116.3	122.8
1993	195.3	123.8	113.9	105.1	119.9	112.8	123.2	119.3
1994	179.1	114.3	104.6	97.2	111.6	103.0	112.8	110.2
1995	166.2	107.3	97.2	90.9	106.3	98.8	107.9	108.2
1996	115.9	89.3	99.5	100.2	130.1	92.9	103.1	103.3
1997	116.9	91.1	101.1	102.5	128.6	96.2	104.1	103.2

Source: Ciset database for the Ciset-GRETA forecasting model TRIP

**Table VII**

Interregional direct and indirect value added effects generated by total tourism consumption (EURO billion), Italy 1997

	PLV	LOM	VTF	EMR	TUL	CAB	CAS	MAM	PUG	SAR	Total
PLV	4.08	0.34	0.10	0.03	0.15	0.02	0.10	0.01	0.01	0.04	4.89
LOM	0.60	5.38	0.93	0.21	0.38	0.06	0.21	0.06	0.05	0.03	7.90
VTF	0.09	0.41	11.62	0.11	0.18	0.03	0.13	0.03	0.03	0.01	12.63
EMR	0.06	0.23	0.24	5.07	0.18	0.02	0.06	0.05	0.02	0.01	5.92
TUL	0.14	0.25	0.23	0.15	10.84	0.26	0.30	0.20	0.07	0.12	12.56
CAB	0.02	0.04	0.03	0.01	0.24	2.23	0.14	0.04	0.14	0.01	2.91
CAS	0.10	0.12	0.18	0.03	0.29	0.19	2.79	0.03	0.07	0.06	3.86
MAM	0.01	0.04	0.06	0.04	0.21	0.04	0.03	2.36	0.04	0.00	2.84
PUG	0.03	0.05	0.07	0.03	0.11	0.26	0.06	0.09	2.03	0.01	2.74
SAR	0.03	0.01	0.01	0.00	0.11	0.02	0.06	0.00	0.01	1.12	1.37
Total	5.16	6.88	13.47	5.68	12.69	3.13	3.88	2.87	2.46	1.40	57.62

- the total level of value added sustained in each macro region by tourism expenditure carried out in it; such an amount is measured by values along the main diagonal. The tourism expenditure in “Piemonte, Liguria, Val d’Aosta”, for example, activated the regional travel and tourism industry by EURO 4.08 billion of value added;
- the total level of value added in each macro region generated by tourism demand in all the other macro regions. These links, whose intensity is proportional to the level of transactions between macro regions, required by that tourism demand, are the “centralising effects” and can be read horizontally in the table. Therefore, still in terms of value added, the travel and tourism industry located in “Piemonte, Liguria e Val d’Aosta” was activated by approximately EURO 0.34 billion by tourism expenditure in “Lombardia”, by EURO 0.10 billion by that in “Veneto, Trentino A.A., Friuli V.G.”, and so on. The total impact is given by adding up Table IV by row, excluding the value in the main diagonal;
- the “leakage” of impacts towards other macro regions which has been stimulated by tourism expenditure in each macro region, through imports of goods and services required to satisfy it. This reading allows us to evaluate the capacity of each macro region to internalise the economic benefits produced by local tourism, limiting their leakage towards the industries of other regions. Tourism demand in “Piemonte, Liguria, Val d’Aosta”, for example, is partly satisfied by goods imported from “Lombardia”, where, due to these imports, approximately EURO 0.60 billion of value added is generated; partly with goods imported from “Veneto, Trentino A.A., Friuli V.G.” where EURO 0.09 billion of value added is activated, and so on. The addition by column, therefore, always net of value in the main diagonal, measures the linkage between the travel and tourism industry of each macro region and the productive system of the rest of Italy.

The balance between the two effects selects the net centralising regions of economic benefits deriving from tourism demand localised everywhere, with respect to those regions producing a net leakage of positive effects, the tourism demand localised in them being stimulated.

“Veneto, Trentino A.A., Friuli V.G.” and “Emilia Romagna” belong to this second category. These are two of the areas with an excellent vocation for tourism, and they match a high concentration of international demand, to an equally high contribution to the leakage towards the whole national productive system of economic benefits stimulated by that demand. Following them with a slight difference between the two effects, the macro region “Campania, Basilicata”.

As well as “Lombardia”, which is characterised by high levels both of centralising effects and leakage effects, and “Piemonte, Liguria Val d’Aosta”, the other important net centralising regions are “Puglia”, “Sardegna” and “Calabria, Sicilia”.

The leakage process of benefits linked to tourism demand concentrated in the North, towards the macro regions of the South, goes mainly through the agriculture and agrifood sectors. Large improvements in industrial activities linked to food production are registered in “Puglia”.

Comparing the sectoral composition in the main net centralising regions with the average national one, it can be seen that:

- both the macro regions of the North show a higher concentration in the products of industrial transformation (25.6 per cent for “Lombardia” and 18.6 per cent for “Piemonte, Liguria and Val d’Aosta”, against the national average of 14.4 per cent) and in “Other market services” (20.7 per cent and 19.5 per cent respectively, against the national average of 18.3 per cent). “Piemonte, Liguria, Val d’Aosta” is also characterised by a high quota of tourism value added in the transport activities (18.6 per cent against the national average of 12.5 per cent);
- Puglia, Calabria, Sicilia and Campania register very high percentages of tourism value added in “Agriculture” (19.7 per cent, 15 per cent, 14 per cent and 11.9 per cent respectively, against the national average of 7.5 per cent) and in “Energy” (5 per cent and 7 per cent against the 3.3 per cent of Italy). In its turn, “Puglia” presents the highest percentage of tourism value added in industrial activities linked to food production of the whole of the South (10.9 per cent); “Calabria, Sicilia”, on the other hand, show a good concentration in

the transport sector (17 per cent against the national average of 12.5 per cent), while in “Sardegna” the energy sector (10.6 per cent of the tourism value added against 3.2 per cent for Italy) and the transport sector (15.8 per cent) gain importance compared to the Italian average.

## Conclusions

This paper focuses on the economic role of tourism in Italy and on the importance of interregional and intersectoral effects. Impacts will change in levels and typologies according to characteristics of tourists and of destinations (structure, organisation, economic, social and political development). So, a good performance in terms of physical dimension of tourism demand (nights and arrivals) does not imply a positive cost-benefits balance for the destination and the host population. It is well-known that tourist flows concentration translates itself into the costs produced by the congestion: tourism demand makes an intensive use of the resources of the destination but it contributes to their safeguarding and maintenance only marginally, even if it produces gross output and revenues for tourism production. These results are strictly linked to different consumption behaviours and purchasing power, which can vary according to specific segments of tourism demand. The prevalence of one segment instead of another, given the same level of flows, determines completely different economic results.

This paper has analysed international and domestic tourism and its national and interregional effects in terms of:

- total level of value added sustained in each region by tourism expenditure carried out in it;
- total level of value added in each region generated by tourism demand in all the other regions: centralising effects;
- impacts towards other regions stimulated by tourism expenditure in each region, through imports of goods and services required to satisfy it: leakage effects.

The balance between these effects has selected the net centralising regions of economic benefits deriving from tourism demand localised everywhere, with respect to those regions producing a net leakage of the positive effects generated by the demand localised in them.

On this subject, as far as the Italian tourism industry is concerned, the analysis stresses that from the attribution of the

tourist expenditure to each of the ten macro regions considered, 40.5 per cent is spent in the two northern tourist areas: "Veneto, Trentino A.A., Friuli V.G."; "Emilia Romagna". Nevertheless, these macro regions balance a high concentration of tourism demand with an elevated contribution to the diffusion of the economic benefits over the national territory. Apart from "Lombardia", the region most industrialised, the net beneficiary regions are some southern areas, principally "Puglia", "Campania, Basilicata", "Calabria, Sicilia". The leakage process of benefits towards the macro regions of the South goes mainly through agriculture and food production.

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