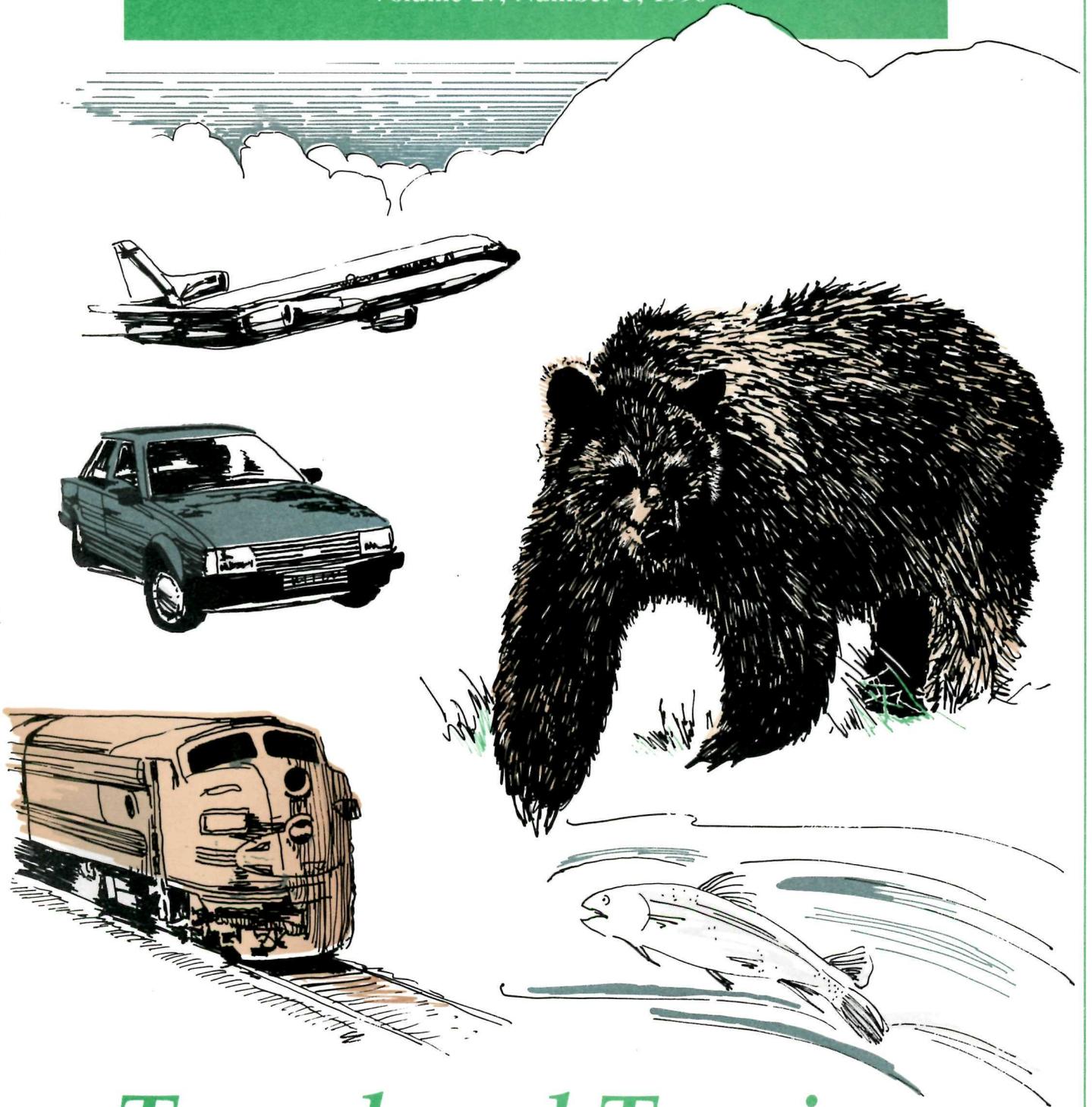


# TRENDS

Volume 27, Number 3, 1990



## *Travel and Tourism*

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## TRENDS

Volume 27, Number 3, 1990

**A Park Practice Program publication**  
The Park Practice Program is a cooperative effort of the National Park Service and the National Recreation and Park Association.

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# Introduction

by Harold J. Nolan, Jr., Ph.D.

**T**he nature of the travel and tourism industry is changing. This change is in keeping with a shifting economy away from traditional manufacturing and agricultural industries to a more service oriented work force. It reflects a change in demographics, represented by a more educated, affluent and mobile society. It is impacted by a variety of leisure opportunities, regardless of whether or not they involve long-term travel or are short-term regional trips. And travel and tourism is most certainly creating an impact on those attractions under the administration of recreation and park managers.

As the tourism industry and recreation and park profession draw closer and become more interdependent on each other, continued and more in-depth analysis needs to be conducted regarding planning, management and justification of the services being offered. Such analysis also needs to take into consideration what effects an expanding tourism industry has on the residents, business and government agencies of regionalized areas. In addition, attention has to be given to the various management considerations which impact directly and indirectly on the operation of recreation-based tourism attractions. Such concerns involve conceptual planning, research, personnel, environmental and economic impacts, marketing and visitor perceptions. It is with these goals in mind that this special issue of *TRENDS* is being devoted to the

tourism industry, with emphasis on the pertinent topics related directly to recreation attraction operations, as well as indirect factors which ultimately affect the use and management of such attractions.

As with any other industry, good management in tourism begins with planning and research. In the first article, Clare Gunn, a leading pioneer in tourism planning, examines the interrelationship of visitors, resource values and limitations, and management. His identification of the need for cooperation between all entities involved in a tourism industry, and the barriers which often prevent this type of collaboration, provide initial groundwork for a more sophisticated planning process. He also describes a variety of solutions which may be used to improve the integration of recreation attractions and tourism development.

It has been accurately stated that all business ventures need to begin with a good solid base of exploratory and ongoing research. The tourism industry is no exception to this rule. In his article, Jim Carr demonstrates why tourist attractions in the State of Kentucky have maintained a solid base of visitors due to an ambitious and professional market research program. He identifies research as a key component to the marketing of tourist attractions, and discusses the types of research which have been conducted in Kentucky. Such innovations as the *Travel USA* study, tracking and evaluation systems, accountability research and the contribu-

tion of tourism research to potential visitors are a variety of examples used to illustrate the diverse ways that research is used in a tourism industry.

As a service-oriented industry, those managers with tourism attraction responsibilities are generally experiencing the same types of problems in the recruitment, selection and retainment of qualified personnel as is being experienced by other service-related businesses in a changing economy. Abraham Pizam and Ady Milman, who have been studying tourism-related personnel issues in recent years, present a review of many of the limitations which managers of tourism attractions often face in obtaining competent help. They also provide a number of options that may be developed to mitigate the negative perceptions which would allow for the retainment of existing staff as well as attracting new employees.

Tourists who visit any attraction, including a recreation-oriented resource, create impacts. Those impacts can be both positive as well as negative, and can occur at many levels. The environmental impacts which occur as a result of a variety of different visitors to Yellowstone National Park are documented by Bob Barbee. Providing examples of often overlooked areas of concern, he cites the impact which visitors have had in past years at Yellowstone National Park on the variety of wildlife there including the grizzly bear and a variety of fish species. He also gives consideration to the number of visitors that a park

resource can accommodate without diminishing the various experiences which they anticipate, as well as analyzing the need to continue research in the 1990s and beyond in regard to changes in user activity and use levels.

A secondary type of impact created by a thriving tourism industry revolves around the economic costs and benefits which are yielded, impractically within a region where tourist attractions are located. And yet research has indicated that most managers of recreation and park facilities are not fully aware of what economic indicators exist for placing a net value of the financial contribution of such at-

tractions. In my own article, identification is made of the three major areas where economic valuations normally occur. A review is also made of both the direct and indirect methods which are used to estimate and justify the true worth of the existence of tourism in a region. Special mention is given to measuring trends developed by such agencies as the U.S. Travel Data Center, U.S.D.A. Forest Service and the U.S. Department of Commerce.

Brian Hill analyzes the need to provide recreation resource opportunities and services to tourists while simultaneously protecting park resources as

well as continuing to meet the concerns of the concessionaires who operate within these facilities. The concerns of environmental groups for limiting resource use is compared to the desire for maintaining existing or additional use levels by park concessionaires, resulting in both temporary as well as more permanent suggestions for managing increased tourist visitation.

While the values of tourism at the regional and national level are deemed important, attractions at various U.S. locations are also having a variety of impacts within international sectors. Dave Edgell explores these impacts with emphasis on specific types of indicators which shape the future of international travel. Trends in lifestyles, international government regulations and competition are all part of



*Tourist attractions can bring economic benefits to a region.*

*Six Flags Great Adventure*

the concern of the international tourism scene.

Tourist attractions, regardless of degree of magnetism, will not succeed without a properly well-thought-out marketing plan. This is the message Jack Samuels provides as he explores innovative marketing and promotions trends in the 1990s. He describes the need for a recreation-based tourism industry to be much more marketing-oriented due to an increase in competition, including the areas of service, segmentation and product positioning. A number of tools are identified for increasing the awareness and market share of the various types of tourists with emphasis on particular types of attractions and a growing trend in leisureized marketing.

Among the various types of

management and marketing considerations in tourism development is the need to create positive perceptions on the part of different types of visitors. In an attempt to demonstrate the significance of international tourists, Francis McGuire and Joseph O'Leary present the results of a study of Japanese visitors to the United States. They review the impact which various demographic characteristics such as age have on the typical level of participation at selected U.S. tourist attractions. In addition, selected psychographic or lifestyle characteristics are presented which help identify reasons why this population engages in U.S. tourism activities.

It is the intent that these few articles can provide an overview of the importance, growth and

management disciplines of a recreation-oriented tourism industry. Managers of recreation attractions, both in public and private sectors, are finding it increasingly important to become more knowledgeable of the variables which lead to a positive experience for visitors, attractions and residents alike. Hopefully this issue will provide practical information as well as stimulate the interest in managers to continue to conduct investigations and research in regard to the best ways to manage their particular tourist attractions.

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# Must Tourism Threaten Parks?

by Clare A. Gunn

**T**oday there are signs of a new era dawning of tourism and park relations. Both the public and private sectors are beginning to cooperate to a much greater degree, demonstrating that conservation and sustainable development is a viable concept.

Still, as concern over damage to the environment continues to grow worldwide, there are many misconceptions about the tourism-park interface. The cry that "we are loving our parks to death" (implying overuse by visitors) is being challenged by loving them enough to plan and manage for mass use and resource protection at the same time.

Research is now demonstrating that most of the threats to park environments world-

wide are not caused by visitors but by other factors such as poaching, pollution and erosion, as reported by Machlis and Tichnell (1985, 24). In California, for example, they reported that two-thirds of the threats to the entire state park system could be attributed to administration and management. And, many of the remaining threats are from factors external to the park and not related to visitors. It appears that we can cope with increased tourist popularity of parks if we implement adequate planning, design and management practices within the parks and greater collaboration with developers outside the parks.

At the first tourism and national park conference held in the United States (1988), several cases were cited where new collaboration between tourism and parks was solving conser-

vation-public use problems. At the Florissant Fossil Beds National Monument, for example, in just a few years both resource protection and tourism economic impact have improved as a result of park-community cooperation. A similar cooperative effort around the Lyndon B. Johnson National Historical Park in Texas was led by Superintendent Harry O'Bryant. A new non-profit organization, the LBJ Heartland Council, is planning for improved tourism development in the surrounding areas including Stonewall, Blanco and Johnson City. Also in Texas, in Comal County and along the Guadalupe River, more visitors are being accommodated, river-bank erosion has been mitigated, lawlessness has been stopped and conflict with riparian property owners has been reduced—all because of new cooperation between tourism developers and park agencies in the New Braunfels area (Watt 1988).

Even so, why aren't these practices more widespread in application? The purpose of this article is to identify several barriers to integrated tourism-park development and to offer some recommended solutions.

## Tourism as a System

Not well enough understood by either the public or private sector (elsewhere as well as in this country) is how tourism really functions because it is an extremely complicated phenomenon. While the business and economic aspects are most conspicuous, tourism



*Lookout tower at Aransas Wildlife Refuge on the Texas Gulf allows many visitors views of whooping crane nesting areas as well as other wildlife.*

Clare A. Gunn

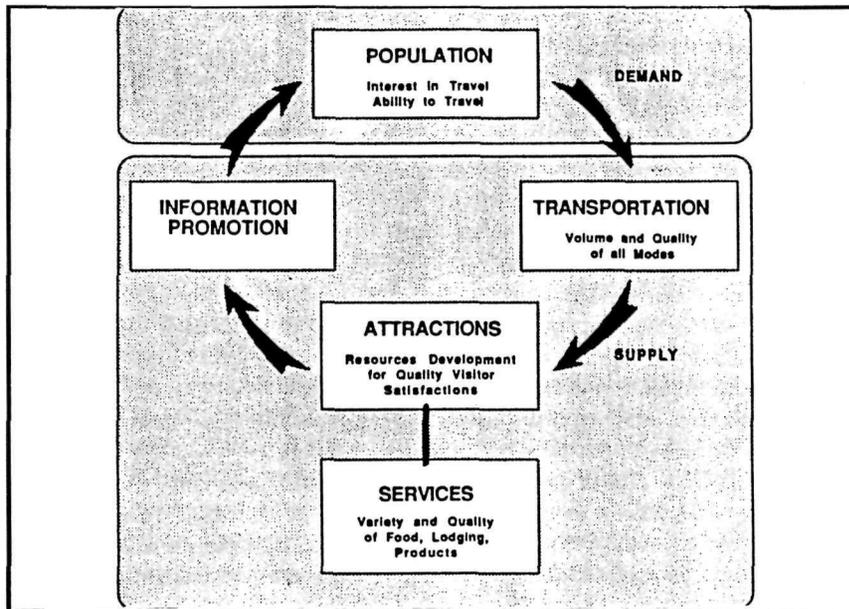


Figure 1. Functioning Tourism System. A model of key functional components. Parks provide an important attraction function. Park design and management are affected by and also influence the functioning of all other components. This is a dynamic and interrelated system requiring cooperation and collaboration among all stakeholders, public and private. (Gunn 1988a, 68)

activity is much broader than this. Figure 1 illustrates the overall tourism functioning system. Study of this can reveal many new opportunities for greater cooperation among the many elements of tourism and parks.

The demand side (push) includes the market—the location and volume of population with interest in and ability to travel. The supply side (pull) includes several major components that are developed and managed by factors within both public and private sectors. The major power unit of the supply side is the **attraction** component. This component serves two functions—drawing power and visitor satisfactions. Closely related are the other important components of

**transportation, services, information and promotion.**

## Symbiosis

The main lesson to be learned from this diagram is that functionally all parts are interrelated. No tourist business and no public agent for parks can operate in isolation. Each one is subject to the policies and practices of the others. Any change in one has an impact on all others.

Virtually all agencies in the U.S. that manage parks and resource areas are involved in this system by providing attractions. Parks, natural areas and historic sites (national, state, regional, local) serve tourism as attraction complexes based on natural and cultural resources.

As attractions, they must be understood and planned in an overall regional tourism context.

The majority of tourist activities depend upon developed sites that utilize natural resources such as water, waterlife, vegetative cover, wildlife, topographic change, geology and soils. In addition, more parks are being based on archeological, historic, ethnic and technological foundations of increasing interest to tourism market segments. As more visitors are able to visit parks, they are more willing to support park budgets and organizations.

In nearly all instances, mandates of U.S. public park and resource agencies require that they provide for public use as well as resource protection. Most of these agencies are also involved to some degree in other tourism components such as transportation, services, information and promotion. Resource managers, therefore, have a stake in tourism and are dependent upon changes and trends in markets as well as all supply components.

Western parks, for example, have introduced literature, signs and interpretation in Japanese to meet the burgeoning travel demand from that country. In his study of foreign visitors to Canadian national parks (1989), Smith concluded that parks should be viewed in a regional context as one element in a larger system of attractions and accommodation services.

## Barriers

In spite of the logic of the interdependencies illustrated

here, several barriers seem to continue to hamper greater cooperation and collaboration among all the stakeholders involved in tourism. Here are a few of the major constraints:

- turf protection that precludes staff interaction with outsiders;
- overheated confrontation between environmentalists and developers that prevents cool-headed discussion of mutual interests;
- legal mandates that proscribe agency functions so much that outside cooperation is prohibited or discouraged;
- lack of personnel, public and private, trained in multidisciplinary tourism interaction;
- philosophical and ideological differences that set apart public and private factors as adversaries;
- misunderstanding by tourism and park developers of the entire day-by-day travel spectrum of tourists that requires integration of all supply-side functions; and
- lack of area-wide approaches to planning and developing parks and tourism service centers as integrated land units.

Gradually, businesses and agencies related to tourism are breaking down these barriers. They are increasingly accepting the dual role of conservation and sustainable development. For example, a joint effort between tourism and conservation interests in Alberta (Wight 1988) identified needs: greater understanding of tourism impacts, planning framework, carrying capacity, different levels of development (zoning),

intrinsic development, better communication and improved interpretation programs.

## Solutions

Following are a few suggestions for improving the integration of park and conservation with tourism development. However, the true solution to this issue will be resolved best only by collaborative effort, case-by-case by the parties involved.

**Multidisciplinary Education.** Input must be added from many disciplines to the specialized tourism and park programs in our educational institutions in order to give students the rounding they will need in a real world.

**Association Responsibility.** Tourist business organizations could take on a stronger proactive role in fostering better integration of parks and tourism development.

**Agency Policy Revision.** Resource agencies of governments now have the challenge of changing their proscriptive policies to encourage greater networking with outside interests related to tourism.

**Joint Public-Private Councils.** Much progress can be made by means of joint policy and program development between tourism private sector and government agency officials.

**Greater interpretation.** Considerable public use pressure can be removed from envi-



*Interpretive Trail at Aransas Wildlife Refuge, Texas Gulf Coast, provides nature appreciation and education for tourists without damage to the environment.*

Clare A. Gunn

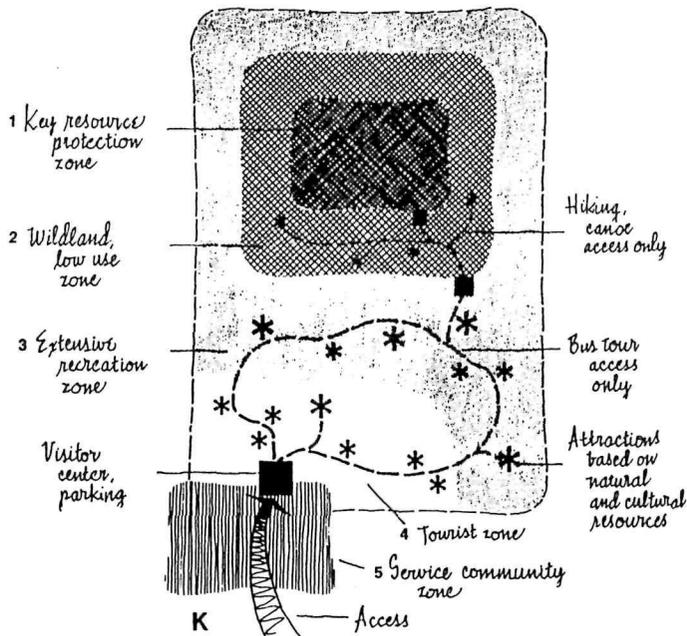


Figure 2. Conceptual Park Region Plan. A concept designed to increase visitor use and satisfaction and yet protect important resources. The several zones are planned on the basis of best market-product match—balancing visitor use with environmental resources. (Gunn 1988b, 85)

ronmentally fragile areas of parks by means of greater facilities and programs of interpretation.

**Joint Area Planning.** Joint physical planning within and around parks could solve many of the current issues.

A suggested concept of joint area planning is illustrated in Figure 2.

This concept is a transfer of the tourism functioning system onto the land. In other words, the greatest economic impact takes place through the tourist services, dominantly located in a nearby service community. This is the most logical location for the lodging, food service, retail sales and other commercial activity associated with tourism for two reasons.

First, the community, not the park or rural area, has the

basic infrastructure (water, waste removal, police, fire protection). Second, the tourist businesses can best serve local residents in a community location. At the same time, the major attractions for visitors are located in the park (or parks) nearby. Joint planning effort by park and area representatives could result in identifying the several use zones illustrated here.

**1. Key Resource-Protection Zone.** This is an area where the resource features are so rare or fragile that public use would damage them. Qualified biologists, landscape architects, historians and archeologists could identify the prime resources of the park, including scenic resources, rare plants, important animals and habitats, and areas of archeological and

historical value that cannot withstand human intervention. Generally, these will be the features that stimulated the creation of the park in the first place. This zone would be intended only for scientific use.

## 2. Wildland/Low Use.

Within the park, other lands may be less valuable but still contain resources that would be disturbed if roads and facilities were introduced. These areas would constitute a roadless zone with limited human access, much like present areas governed by wilderness policy. Controlled hiking, canoeing or other modes of limited use could be designed and managed without disturbance of key resources. An interpretive center at the border between zones 1 and 2 could help visitors understand the environment.

## 3. Extensive Recreation

**Zone.** Specialists could identify specific areas outside the wildland zone that are extensive and stable enough to support extensive recreation. Hunting, fishing and camping could be provided in accordance with proper planning and design principles. Excessive roads and parking could be avoided by use of buses or other people-movers. The extent of this development would need to be in balance with the resource base.

**4. Tourist Zone.** Special sites and travelways for motorcoaches, monorails or other forms of mass transportation could be installed for visitor use. Proper design of facilities to handle mass use could protect resources and allow

public enrichment. For example, travelways could penetrate restricted zones permitting visitors to see, but not come in contact with, special resources. These travelways would not be open to personal vehicles. Special turnouts, overlooks and interpretive centers along the way could contain educational exhibits, literature, slide presentations and lecture rooms.

**5. Service Community Zone.** At the edge of the park, either just inside or outside the boundary, a service community zone could operate independently as a city. All development would be established in response to market demand, pro-

viding services for several market segments. Today, enough is known about urban design to plan and create attractive, functional and market-oriented communities. Although new towns may be necessary, it is far better to expand one that has an established infrastructure and management policy.

This concept is suggested to stimulate consideration of tourist destination zones as a whole. Application of this concept would include many land jurisdictions, public and private. Obviously, it demands cooperation and even collaboration across many jurisdictional lines.

But, experience is now demonstrating that leadership and networking can foster mutual resolution of issues and integrated planning of seemingly scattered and unrelated land developments and programs. No, tourism need not threaten parks. Yes, tourism and parks are compatible provided that joint planning and management programs are put in place.

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# Trends In Tourism Market Research

by James A. Carr

**A**s industries such as manufacturing, agriculture and mining have declined as job producers in recent years, alternative industries have been sought to replace employment losses. The tourism industry has become one of the key elements in the new economic development strategy of states. It is among the service industries which show promise of continued growth in the 1990s and beyond.

Although the tourism industry has been expanding for several decades, its importance as a revenue and job producer was only discovered by the states in the early 1980s. Since that time most states have substantially increased their investments in this industry. This has taken the form of much larger marketing budgets for the state travel offices. These combined budgets have grown from \$100 million to over \$300 million during the decade.

While the majority of such funds have gone directly into advertising of a state's tourism product, large sums have been spent on other marketing efforts as well. Included among these initiatives are: consumer trade shows, group travel promotion, familiarization tours, media relations programs, highway welcome centers and matching funds programs. Each form of marketing represents an important seg-

ment of a state's overall tourism promotion strategy. These programs, in combination with advertising both domestic and international, provide the nucleus of a successful tourism marketing program.

## Research

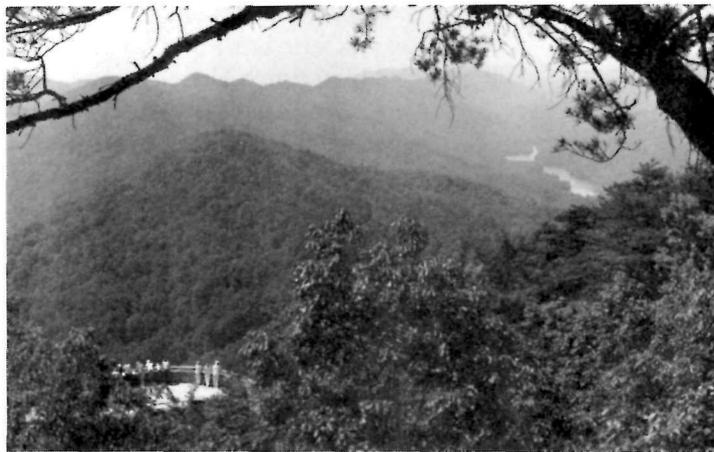
An important, yet often overlooked, contributor to the effective use of tourism marketing funds is quality research. A tourism marketer cannot maximize the return on investment without a solid understanding of the marketplace and the product that is available for consumption by potential travelers. Sound research will provide the information that marketers need in order to develop the appropriate message and to correctly identify the market segments to which the message should be directed. Research is further necessary to measure the effectiveness of the marketing program. One benefit is to provide feedback which can

then be used to improve the delivery of the message. Successful marketing is a continuous process which requires frequent review and modification.

The tremendous surge in marketing budgets during the 1980s and the accompanying desire that potential visitors receive the state's message as soon as possible have often resulted in sound, time-consuming research being ignored. Frequently, advertising is generated without a solid base of information supporting it.

A key to effective marketing is an integrated research program. This requires the blending of several different kinds of research which, when taken in combination, result in the development of a successful marketing strategy. The elements of such a research program are market analysis, tracking, program evaluation and industry monitoring. While each can be, and often is, pursued separately, they become a powerful research tool when integrated into a single program.

The state travel office of Kentucky experienced growth in marketing in the early 1980s parallel to that of other states. One important difference was that Kentucky not only perceived the need for a research program, but also acted upon this conclusion. Consequently, an adequately funded research program



*A professional market research program provides data on potential visitors to regions such as Kentucky's Cumberland Gap National Historical Park.*

Kentucky Department of Travel Development

was put in place at the same time as the marketing program grew. The discussion which follows includes a description of the type of research which has been conducted in Kentucky. A fundamental aspect of this program is the fact that a concerted effort was made to totally integrate the various types of studies into a comprehensive, applied research program.

## Market Analysis

Central to any tourism marketing effort is a clear understanding of the visitors. This requires a detailed examination of the travelers' demographics and selected other characteristics such as exposure to media and the trip planning process within the household. In addition to these basic issues we are beginning to observe a greater focus on psychographic factors including what motivates people to select a particular destination and what is the perception of a destination's image.

These data must be updated periodically to keep abreast of any changes in the characteristics of a destination's market. For example, in Kentucky market analyses of visitors to the state have been conducted every three years since 1981. This periodic updating of the traveler database has provided the state's advertising agency with information needed to modify the marketing efforts.

However, this database, developed initially from nearly 11,000 face-to-face interviews with travelers at tourism businesses across the state, had a

critical gap. It did not provide a measure of the potential visitor to Kentucky who was choosing to go elsewhere. Until now the cost of obtaining this information was viewed as prohibitive. But a research vehicle is presently available which will address previously unanswered questions about the potential visitor to a state. It is the *Travel USA* study being conducted by Longwoods International, Inc. This is the first nationwide tourism marketing study which will provide very detailed data on travelers that can be used by both states and sub-state areas.

## Tracking

Since many of today's state tourism advertising campaigns are designed to generate requests for information from the state travel office, it becomes important to track this advertising response. It is the first indicator that the campaign is reaching someone. The advertising concept may have performed well in the various pre-tests conducted, but if it fails to produce inquiries for information, it has not done the job.

Accurate tracking of the advertising response can answer basic questions about the effectiveness of the advertising. It can show how closely the geographic origin of the response matches the geographic distribution of the advertising. The volume of response by type of media, relative to the investment in the various media, can also be discerned. A more detailed tracking of response within media is also possible. For instance, the number of

inquiries received from those exposed to an individual publication or within a particular market area can be determined. These data provide immediate feedback to the marketers as to the success in generating response to individual advertisements, as well as for the campaign as a whole.

When tracking data are analyzed in conjunction with cost data for individual advertisements or with market size information, they can provide useful relative measures of the advertising performance. Cost per inquiry allows for the ranking of the various publications and broadcast markets against one another on a predetermined standard. The market size information permits the development of a market penetration measure which shows the relative success of advertisements in reaching the individual households within a market. These measures shed additional light on the marketing plan. Consequently, they aid in the evaluation of the ongoing marketing and contribute insights which will result in modifications prior to the beginning of the next round of advertising.

Much progress was made during the 1980s in the accurate tracking of response. Few states began the decade with computerized systems designed for this purpose. Today many of the states, including Kentucky, now have sophisticated computer systems in place to monitor responses. This has helped to eliminate errors in tracking and also to greatly expedite the entire process. These systems are tied directly to the

state's toll-free telephone facility as well as to its mail processing operation. A useful by-product of the tracking has been greater inventory control over the agency's brochure distribution process.

## Program Evaluation

Another form of marketing evaluation is the measurement of its ability to generate visitation. Efforts to accomplish this have been made in a number of different states on a sporadic basis. These attempts relied on a form of analysis referred to as conversion studies. This research attempted to measure the proportion of those who had responded to an area's advertising and subsequently visited that area. An estimate of the economic impact of those who visited was then generated. These expenditures were totally attributed to the advertising. Very large returns on investment, such as \$100 for each \$1 invested, would result.

This research oversimplified a very complex causal process. Advertising does influence travel behavior. However, the measurement of how this process works is still not well understood. To say that all travel behavior results from exposure to marketing attempts is to grossly overstate the effectiveness of advertising.

The trend in recent years in this type of analysis has been to-



Kentucky Department of Travel Development

*Over 200 horse farms of Kentucky's Blue Grass Region attract various tourists each year, as well as provide possible future entrants in the famed Kentucky Derby.*

ward accountability research. This takes a number of different forms. In one form no attempt is made to determine return on investment. Instead, measures of advertising awareness are made. In this analysis the initial level of awareness of the product is measured relative to the level after the advertising has taken place, in order to assess the change in awareness of the product. This analysis frequently attempts to also measure the image of the destination and how advertising may have altered that image. This research is useful to those who are charged with designing and modifying the advertising message.

A second form of accountability research recognizes the need for a quantitative measure of return on investment. Policy makers including legislatures thrive on the single-number mentality. Right or wrong they require that the effectiveness of advertising be put in these terms. In Kentucky and elsewhere efforts have been made

to improve on conversion studies and introduce a measure of accountability into the analysis. This research does not stop at simply measuring the proportion of those who inquire as a result of the advertising and subsequently visit the state, but also attempts to measure the proportion of those who visit because they were influenced by the ad-

vertising.

Those travelers to the state who had made up their minds to visit prior to experiencing the advertising, or who felt that they were not influenced by the advertising and had still visited the state, are excluded from the analysis. Those who visited and answered that they were influenced by the advertising to visit are a much smaller subset of the total who inquired as a result of the advertising. The economic impact generated by these travelers is then weighed against the cost of the marketing program. This process yields a net return on investment. This return is typically in the range of \$5 to \$9 returned for every \$1 invested in advertising.

These forms of accountability research, while a marked improvement over conversion studies, still have limitations. They do not definitively describe the causal link between advertising and travel behavior. Also, they potentially underestimate the magnitude of travel generated by advertising,

because not everyone who responds to a state travel advertisement does so through the state travel office. While the previous measures strongly suggest that travel advertising is effective, improvements remain to be made which will allow for the determination of just how effective the marketing and advertising efforts truly are.

## Industry Monitoring

The previous discussion has dealt with micro-level analysis of tourism issues. Equally as important to an integrated approach to tourism research is macro-level analysis. This involves the measurement of the aggregate results on the industry of all the marketing efforts combined. This examination provides an overall determination of the state of the industry.

In Kentucky macro analyses are conducted monthly throughout the year. Level of business activity by industry sector (hotel, attraction, etc.) and geographic region is determined relative to the same month in the previous year. This provides a sensitive indicator of the fluctuations in travel to the state. The research monitor is called the travel barometer.

At the end of the calendar year the data collected for the monthly travel barometer are merged with data from a second sample of travel businesses and with the results of sample surveys of travelers in order to determine the economic impact of the industry. This elaborate blending of data makes possible the estimation of direct tourist

expenditures in each of the counties of the state.

These expenditure data serve as inputs into an input-output (I-O) model of Kentucky specially designed with a tourism component by the Regional Science Research Institute. This model is used to translate the tourist expenditures into the number of jobs they create as well as the type of jobs generated. This analysis repeatedly demonstrates that tourism creates a much greater proportion (nearly 30 percent) of high wage jobs than is commonly believed.

The I-O model also provides estimates of state and local taxes, wages and the indirect and induced spending effects (the multiplier effect). This yields a much more complete picture of the importance of tourism to the state's economy than can be obtained from measurement of the direct effects only.

In addition to showing the macro-level impacts of all marketing efforts, this economic impact research has spin-off uses. It can be used to determine the economic contribution of market segments such as group travel. It contributes to the business development efforts of potential investors in the state's tourism product. It can even be used to address policy analysis questions when used in conjunction with the FS-53 model developed by Regional Economic Models, Inc.

The trend in the 1980s has been toward greater use of input-output models in order to more fully describe the total contributions of tourism to a

state's economy. Macro models should continue to grow in importance as the industry grows more sophisticated and its marketing and product development needs become more complex.

## Summary

Even though the resources allocated for research are growing at a slower rate than those for marketing, nevertheless tourism research is growing both in quantity of studies and in sophistication. Prior to the 1980s examples of the types of studies presented above were found only infrequently. The past decade has seen a rise in these types of research.

The very large increase in marketing activities has stimulated the research efforts. Information is critical to the design, implementation, tracking and evaluation of advertising and other forms of promotion. Quality research is now needed to ensure the maximum return on this investment.

The contribution of research to effective marketing is increased when the studies are integrated into an ongoing program. In this scenario information critical to the success of the promotional activity is provided in a more cost-effective manner. The end result of this marriage of marketing and research is a successful marketing strategy.

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# Current Trends in Manpower Needs for the Tourism Industry

by Abraham Pizam, Ph.D., and Ady Milman, Ph.D.

**T**he tourism industry has been a major contributor to the labor market. In 1988, the industry generated 5.42 million direct jobs with a payroll income of over \$69 billion (U.S. Travel Data Center 1989 Travel Tab). In addition to these direct jobs, the tourism industry has also indirectly generated millions of jobs in other industries.

In spite of the large contribution of tourism to the labor market, manpower is one of the most dominant long-term problems facing the industry, especially in the accommodation, food service and attraction sectors.

The objective of this article is to review current trends in manpower issues and to offer some solutions to the problems facing the industry.

## Labor Supply and Demand

A few current demographic factors must be considered when reviewing the current labor market. One of the major reasons for the crisis in the tourism job market is the "graying of America" phenomenon, namely the continuing population decline of the 16-24 age group.

A large proportion of jobs in the industry have very little appeal to young people, mainly due to low pay, hard work, undesirable hours and poor working conditions. Consequently, these people prefer to work from their own homes, in air conditioned offices or even

factories, than to stand long hours by a theme park turnstile or in a hot hotel or restaurant kitchen.

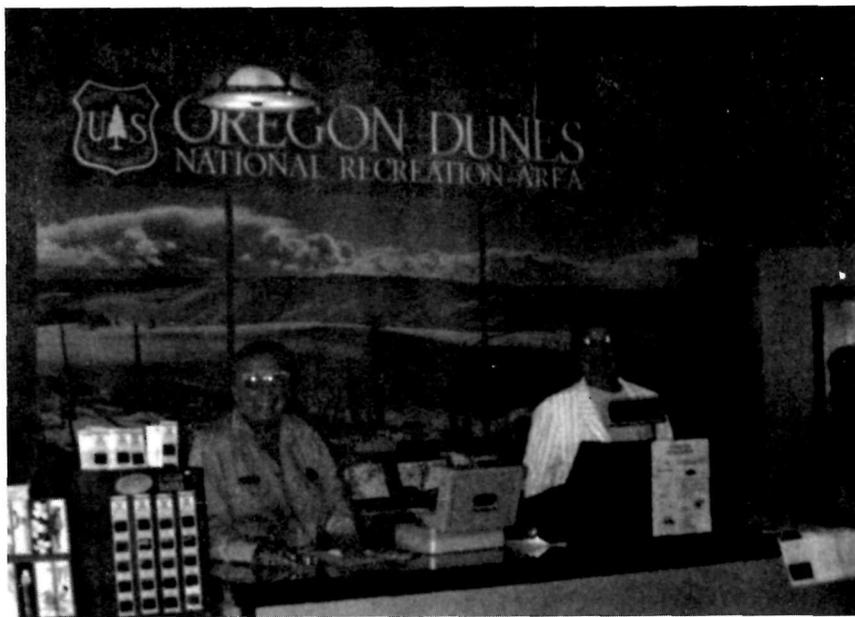
In addition, young workers perceive their tourism jobs as ad hoc or short-term solutions to their cash flow problems while in school or looking for new jobs in other industries. The outcome of this trend is reflected in high turnover, low motivation, poor productivity and job dissatisfaction.

Tourism, like many other service industries, is labor intensive. However, unlike some of the other service industries that substitute manpower with capital, technology or customer self-service, the tourism industry relies heavily on people for the success of its operation, since only people can deliver personal service which is its most important "product."

Customers in top restaurants enjoy the personal touch of being served by courteous and professional waiters rather than by automatic robots or serve themselves.

Hotel chains have recognized these guest preferences and recently introduced expensive "concierge floors" that offer more personal service and guest-pampering such as: bed turn-down service, shoe polishing, nightly hot milk and cookies, complimentary newspapers, etc. These additional services create an even greater demand for labor.

Although the manpower shortage is mainly exhibited in unskilled and semi-skilled occupations, many hotels, restaurants and other food service institutions are also confronted with a shortage of skilled and managerial personnel.



Harold J. Nolan, Jr.

*A pleasant experience by visitors is often the result of friendly staff such as those at the Oregon Dunes National Recreation Area.*

## Solutions

As the demand for service employees increases and the supply decreases, many tourism businesses will have to become more innovative and aggressive in their personnel recruitment and retention processes. Some of the following strategies are suggested to tackle the problem of labor shortage.

### 1. Improve Industry's Image

It is an unfortunate fact that the tourism industry in many parts of the world is perceived to be unattractive and has a poor image among the general population. A recent study of unemployed workers in the United Kingdom revealed that over one-half of the unemployed people sampled had worked in the past in the hotel and food service industry.

These people, however, did not want to return to the industry due to the perception of low pay and poor management attitudes (Hall and Jones 1989).

It is our belief that the image of the industry can be improved through concerted publicity campaigns, massive advertising and educational programs delivered in high schools and universities. The aim of all of these programs ought to be the creation of a positive image of tourism jobs and occupations. While the industry's trade associations are currently spending hundreds of thousands of dollars in publicity campaigns aimed at informing the public about the economic benefits of the industry, no financial resources are devoted to educating the public about rewarding jobs and available career opportunities.

### 2. Change Managerial Style and Improve Employee Benefits

Some tourism enterprises (e.g., the Marriott Corporation) have few problems in attracting and retaining employees because they have created a better social work environment for them. These firms have realized that by changing the managerial style to a more democratic one, by opening the communication channels and by introducing employee participation in decision making, employees tend to be proud of their work and loyal to the organization.

Furthermore, these companies provide their employees with an array of benefit plans that employees can choose in order to satisfy their needs. While some employees prefer health and dental insurance and on-site child care, others choose a benefit package that concentrates on free food and uniforms, extensive vacation time and discounts.

### 3. Pay Higher Salaries

The U.S. Senate approved a bill on April 12, 1989, that would raise the federal minimum wage to \$4.25 an hour by the start of 1992, from the current \$3.35 an hour, and would create a separate, sub-minimum temporary training wage. Despite the fact that the majority of the industry currently pays rates above the \$3.35 an hour, the industry fiercely objected to this legislation. The common belief among many industry leaders was that this raise will cause a "domino-effect" by increasing wages and



Harold J. Nolan, Jr.

*A pleasant environment which adds to the magnetism of the Gateway National Recreation Area, Sandy Hook, is the result of dedicated staff.*

salaries throughout the industry and resulting in higher prices for the consumer.

Since demand for tourism goods is very elastic, any increase in consumer prices will lead to a reduction in demand. While we tend to agree with the "domino-effect" theory, we strongly dispute the argument that an increase in wages and salaries will result in a reduction in demand for tourism products. We believe that tourism has become a social need and as such its demand is becoming relatively inelastic. Furthermore, today's tourists recognize the notion of "value for money" and are willing to pay relatively high prices for good quality products.

#### **4. Attract Non-traditional Labor**

Another option to increase the tourism industry labor supply would be to offer job opportunities to non-traditional markets such as retired people, minorities, housewives and persons with disabilities.

Unfortunately, many firms, while recognizing the importance of these special markets, fail to provide them with the kind of flexible and tailor-made conditions that would make their work possible. The common practice among many employers is that of requesting these employees to adjust and conform to the rules and regulations of the organization, rather than adjust the rules and regulations to meet employee special needs.

For young people, for example, a provision of clear career structure and develop-

ment options is mandatory. For elderly people, provision of reduced and unconventional working hours is a must. Similar provisions should be made for housewives and young mothers who are interested in part-time jobs and free or subsidized child care facilities. Last, but not least, in order to make successful use of the handicapped one needs to redesign many jobs and make them manageable to people with mental or physical disabilities.

#### **5. Introduce High Technology**

In the long run the only solution to the problem of poor physical working conditions in the tourism industry is to restructure the work environment by eliminating most unskilled jobs and replacing them with automation, robotics and consumer self-service.

The introduction of high technology could modify the tourism industry by making it less labor intensive. Although hotels, restaurants and tourist attractions will always require the personal touch of service employees, sometimes the guests themselves may substitute many of the tasks of unskilled labor as long as there is a willingness to do so (Pizam 1982). This is currently exhibited by the self-service buffet restaurants or automatic check-outs at hotels.

Furthermore, fast food chains have successfully lowered labor costs by implementing computer-designed, step-saving layouts; shorter business hours and selective menus to maximize efficiency (Bonn and

Pizam 1989). Though automation and robotics have not been extensively used in the tourism industry, a few products are already in the experimental stage. Japanese companies have recently introduced robots that manufacture sushi and clean hotel rooms while American companies are currently experimenting with a robotic pizza arm.

#### **6. Develop Recruiting Marketing Campaigns**

Some tourism recruiters (e.g., the Marriott Corporation) have developed marketing plans to recruit employees, using the same strategies they use to attract guests to their hotels or restaurants. For example, since "word of mouth" advertising was found to be very effective in attracting guests, the same technique was also applied to attracting employees. Quite a few tourism businesses rely on their current work force to recruit new employees and even offer a "referral fee" to employees who recommend new recruits who stay with the company for a minimum of six months.

Creative newspaper advertising campaigns is another strategy employed by this new marketing approach. The ads usually offer attractive incentive plans to lure new employees. Furthermore, some of these ads recruit prospective employees by offering them attractive titles such as partners or associates.

The Olive Garden restaurant chain's "come work in the garden" or Marriott Fairfield Inn's "Celebrate Our Quarterly Bonus" campaigns are typical

examples. In addition, posters and pamphlets placed in strategic areas like supermarkets, discount stores and movie theaters have proved to be an effective advertising alternative at a fraction of a newspaper ad's cost.

### **7. Offer Multi-Ladder Career Options**

As previously mentioned, many tourism jobs do not seem attractive because of long working hours, weekend and holiday shifts and frequent relocation requirements. By offering various career paths to accommodate individual needs, many companies could attract new employees and retain their current ones.

Some hotel chains (e.g., Marriott) offer their employees either a fast career path where employees would need to spend long hours on the job and would be willing to relocate frequently in order to be pro-

moted, or a slow career path where the company's demand and expectation would not be as high but consequently promotion would not be as fast. Other companies offer additional career options to best suit the needs of their employees.

### **Conclusions**

The problem of labor shortage in the tourism industry will, for the time being, remain a principal issue. With the high cost of turnover many companies will be forced to become more creative in dealing with the decreasing labor supply.

Although no one method or technique can solve the labor shortage problem, a combination of the approaches suggested here can be beneficial to keep employment rolls full of qualified employees.

However, the key issue is not only recruiting new employees but also retaining existing

ones. The competition for labor in the tourism industry is high, and many employees are tempted to leave their current jobs for higher pay or better benefits offered by other companies. To successfully retain employees, companies must conduct orientation programs to new employees that will familiarize them with the company's goals and policies. By so doing, new employees would know what is expected from them and motivation will increase. Training could also be used as a tool for retaining employees.

Finally, many hotels, restaurants and attractions keep reviewing their benefit plans and making sure that they continue to satisfy their employees.

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# The Visitor and the Resource: Prospects for Protecting Resources and Enhancing the Visitor Experience

by Robert D. Barbee

**T**he challenge of the National Park Service's dual mission—to preserve unique natural settings and yet make them available for visitors to use and enjoy—is well known. As long as we take both elements of that challenge seriously, we are in for not only contention and controversy but also the most rewarding sort of on-the-job training imaginable. After almost 120 years and upwards of 90 million visitors, Yellowstone National Park seems to have plenty of lessons yet to teach us.

The great writer Wallace Stegner once said that the national parks were the best idea we Americans ever had. Many of us in the parks would agree with that, but after all these years we've learned that a good idea, though it was essential, was hardly enough. Yellowstone's Chief of Research John Varley has often observed that "We didn't buy into a turnkey operation when we decided to create the world's first national park." Unlike other elements of American culture—our music, our religions, our legal system—which we built from European traditions, we did not inherit an Old World format for how to run national parks.

National park historians are familiar with the stumbling process by which we sorted out just where visitors fit in today's parks. Here in Yellowstone, where many such lessons have been learned, hunting was a legal use of the park from its establishment until 1883, when it became clear that we were

going to have to find other ways to feed visitors if we expected the wildlife to last. Commercial fishing, to provide park restaurants with trout dinners for visitors, continued until 1917. In the interest of visitor convenience, bears were fed at public viewing grounds until the 1940s, and public feeding of black bears continued along park roadsides until the early 1970s. In these and many other ways, the balance of resource protection and resource preservation has shifted, most of the time toward less consumptive and intrusive ways for park visitors to enjoy Yellowstone.

We have enjoyed the support of the conservation community in most of these efforts, and at times it has probably seemed that the right thing to do was obvious. But more and more these days, advances in ecological science reveal to us that what once seemed simple is very complicated. It turns out that for most of the park's history we had no idea how much effect we were having on the park. A few examples follow that may catch the spirit of those subtle effects and our attempts to deal with them.

Consider the grizzly bears. Yellowstone and the surrounding lands of the greater Yellowstone area host one of the last populations of this magnificent animal in the lower 48 states. In the past few years, interagency cooperation and a heightened public concern have resulted in the improved status of this population, which have long been believed to be in decline. But in the process of developing

these new management systems, we have completed research projects with some startling findings.

For example, a decade of radiocollaring work revealed that the park's road system, the product of an earlier and less ecologically sensitive era, was having significant effects on the well-being of this population of bears. Imagine you were asked to design a road system for Yellowstone. Where would you put the roads? Most of us would be inclined to run them right through the most beautiful meadows and along the most scenic and trout-filled rivers. Something like that happened, and as a result bears and other wildlife were displaced from some of their most important and preferred habitats.

In Yellowstone's bear population, a difference of one or two additional annual mortalities of adult breeding females can spell the difference between a stable and a declining population. Yet the scientists in the Interagency Grizzly Bear Study Team tell us that "habitat production sufficient to have supported three-to-four adult females was estimated to have been lost due to the effects of roads and developments."

That's not all. Roads mean more animals killed by cars and more animals becoming habituated to the presence of humans, with resultant greater risks of human injuries and bears destroyed to protect property and life. The park was a century old, and our road system was enjoyed by tens of millions before we even dimly wondered if there wasn't some price being

paid here. There was, and the bears were paying it.

Americans won't stand for the removal of Yellowstone's roads, and recent research on the bears suggests that they can survive despite the roads. But the roads are a good example of the challenges facing managers when they try to find new ways to compensate or mitigate for human intrusions.

Of course, the bears are only the most spectacular and newsworthy of the park's many natural resources. They are often used as a good indicator of the health of the park, but they hardly reflect all the complexities of the Yellowstone wilderness.

Fish may serve as a much better indicator of Yellowstone's health. Yellowstone is world famous for its trout fishing, but by the 1960s, park fish popula-

tions were in desperate condition due to overfishing. It became clear that we had to strike a new balance between visitor use and resource protection, and so in the late 1960s, new, more restrictive regulations were applied to fishing.

These new rules aimed at emphasizing the sport rather than the harvest. A variety of catch-and-release rules and limits have been instituted and experimented with, and the results have been remarkable. By encouraging or requiring visitors to enjoy the fishing in this less consumptive way, we have been able to restore Yellowstone's fisheries to near-primitive condition. The park is regularly hailed as a vanguard of progressive fisheries management, and its example has been followed in many parts of the country. The fishing is out-

standing. But this time, the visitors paid a price, in uneaten fish. Most would agree the price was worth it. Those fish are now being eaten by other park residents, particularly in the bear population.

As the fishing harvest by humans was reduced and as the fish population in Yellowstone Lake restored itself to its former vigor, researchers noticed increasing bear presence along the lake's many tributaries during the trout spawning season. Historical records only hinted at bear use of these fish, so we didn't really know what our overharvest of the trout was costing the bears. But between 1977 and 1987, we saw a tripling of the number of streams used by bears for fishing, and it became clear that trout had once been a major protein source for park grizzly bears, a source we'd denied them for a long time. As the fish population grew, so did bear use. Dr. Steve French of the Yellowstone Grizzly Foundation recently watched an adult grizzly bear kill an average of 100 trout a day for 10 days during the peak of the spawning run on one park stream. That is an enormous protein boost for a hungry bear whose foremost interest in life is building a layer of fat for the winter.

Of course, many other animals benefit from the return of the trout. Bald eagles, osprey, otters, pelicans and many others are taking advantage of the food. Increases in the health of these animal populations in turn benefit the visitors, who see them more frequently.



National Park Service

*Regular tourist visitation to Yellowstone National Park has taken place for over 100 years, as this 1901 fishing group indicates.*

But we don't want to sound like we consider this a problem completely solved. Sport fishermen still take about 100,000 pounds of trout—about 5 percent of the total biomass of the spawning runs—from Yellowstone Lake annually, and we must ask ourselves if that is too much, or if it is affecting the animals that depend on the fish. And we must ask ourselves if we are fully honoring our mandate to protect park animals in their natural states when we allow one species—the cutthroat trout—to be harvested so heavily. These are difficult questions, and we are a long way from having all the answers.

There are many such examples of the complexities of managing the park's natural setting so that we fully protect it while permitting people to enjoy it. But there are two types of management in Yellowstone. There is management of the natural resource, and there is people management.

Good people management is more than just directing traffic and crowd control. It is learning what people want and need. It is helping them to enjoy the park and find the inspiration and fulfillment it can provide. It is educating them to the risks and potential damages their enjoyment might cause. It is alerting them to the dangers inherent in traveling in wild country. And it is trying to find out how much of their use the natural setting can tolerate.

In recent years, much has been made of the difficulty of achieving the Park Service's dual mission. It has been claimed by a few observers that



National Park Service

*Uncontrolled tourist visitation can create a negative impact on a variety of natural resources, including this grizzly bear.*

you can have preservation or you can have use, but you can't have both. We disagree. Our mandate does not deal in absolutes. We know we cannot have total preservation or complete, unhindered use. The goal is to find those levels of use that will not significantly diminish the resource.

The key to success is, of course, knowledge. Knowledge requires research—lots of it. Research gives us the tools to make informed decisions about future use of the resource.

There is a popular phrase in wildland management these days—"Limits of acceptable change." The more we learn about the natural systems in Yellowstone and the more we understand our ability to affect those systems, the greater our

responsibility to determine just how much we can permit ourselves to change things. We must always question ourselves, as we do when we wonder if the harvest of 100,000 pounds of trout is an acceptable alteration of the natural order of things on Yellowstone Lake.

People management is largely the regulation of appetites. We as a nation have decided that trout in Yellowstone Park should serve other appetites—those of bears and birds and those of sportsmen looking for an exciting experience—to a higher end than is achieved by a fish dinner. America's appetite for nature and wilderness is great. Yellowstone's ability to satisfy that appetite is limited.

This has caused us to think hard about the notion of human carrying capacity. The question we must continually ask ourselves is, how many people can the park satisfy before the park itself is diminished? There are many additional questions, of course, such as how do you define diminished? Once you've defined and clarified these problems, how do you manage them?

Here in Yellowstone, we defined one kind of carrying capacity 25 years ago when we established a ceiling on how many "pillows" or sleeping spaces the park would ever offer people. In the early 1970s we established another kind of carrying capacity when we created a backcountry campsite system that limited the number of overnighters who could at any time be using the park's fragile backcountry trail system. We still need to know more

about these kinds of ceilings and may have to change them again if new research reveals they are too high or too low.

There is no limit of any kind on day use of the park, either along the roads and in the developments or in the backcountry. While overnight backpacking is declining nationally, day use of hiking trails in Yellowstone has increased. We are hard at work studying the effects of that use on the natural systems, but the systems are complicated and the work is expensive.

A recent study of cross-country skiing use patterns on Yellowstone's northern winter range revealed that skiers can have significant impact on the energy reserves and movements of elk. Elk routinely fled from skiers nearby and did not stop running (often through deep snow) until they had put a ridge between themselves and the humans. In the winter, when food is hard to come by and energy reserves are already low, it doesn't take much of this kind of stress to put an elk over the edge into a downward slide to death. Recent increases in winter visitor day use concern us; the park is fabulously

beautiful in winter, and more and more people are discovering the wonder of that season here. We must balance that appetite with the needs of nature.

We've come a long way in Yellowstone, from the days when you shot an elk to eat, to the days when you must realize that even with a camera you can negatively intrude upon that elk's natural habits. No one said this was going to be easy, or that we'd find answers we could all agree upon. Despite what some of our friends in the conservation community say, it is not our mandate to preserve Yellowstone as a perfect, unhindered example of primitive America. It is our mandate to maintain as many of Yellowstone's natural systems as possible, recognizing that as long as we honor the other half of our mandate the goal will not be perfectly achieved.

But it is clear to us now that for a long time natural features were given less considerations in many decisions about how to care for the park. We are moving toward greater attention to the needs of the natural system, and some human activities are necessarily going to be affected. That does not

signal some new attitude about humans and their place in parks. It only reflects a new awareness of the unknown effects we have had all along, effects we now understand better. We still have much to learn, and it will take all of our collective wisdom, patience and respect for the parks' extraordinary values to arrive at acceptable solutions to the challenges we face.

The parks are still our greatest idea, and they are still far from being a turnkey operation. Visitors will, for many years to come, continue to encounter changes in park management that affect their experience. As long as we take our mandate seriously, we will be learning new things about our relationship to the park resource, and we will therefore continue to define and redefine our definition of an appropriate visitor experience in the parks.

*Robert Barbee has been Superintendent of Yellowstone National Park since 1983. He recently received the prestigious Stephen Tyng Mather Award from the National Parks and Conservation Association in recognition of his work in furthering the cause of national parks.*

# Economic Trends in Tourism Valuation

by Harold J. Nolan, Jr., Ph.D.

**D**uring the past decade researchers, managers and elected officials, including those in the recreation and park profession, have been giving greater consideration to the variety of impacts which are created as a result of a tourism industry. Many of these issues might be labeled as "intangibles" (social, psychological and cultural values), while others fall into a more "tangible" category (physical, historic and economic values).

Among the more pressing of these issues as we enter the 1990s is the degree of economic value which tourist attractions provide to a regional economy. The importance of attracting visitors to a particular tourism-oriented region has always had a degree of financial importance attached to it. In today's world of changing economic structures, concerns about planned reductions in U.S. manufacturing and agricultural goods, along with an increase in the communications and service industries, are creating a greater importance in the growth of tourism.

At the macro level is the need to replace jobs lost through the changing economy, development of the industry in ways which will fit the image of a new, service-oriented nation and the potential of tourism as one method for equalizing federal trade deficits with other countries. From a micro perspective, concern revolves around local regions and

communities, and the determination of the benefits of a developing tourism industry as opposed to costs. In conducting such an analysis, it needs to be clear just what the regional economic benefits involve in a recreation-oriented tourism industry, and which tools are used in conducting such research.

## Three Measures of Economic Value

As the economic indicators of tourism and recreation are reviewed, it may be helpful to delineate some of the broad topical areas which contribute to this study area. Economic value derived from tourism-related recreation attractions include (1) visitor benefits, (2) attraction benefits and (3) regional benefits.

Visitor benefits (also known as national benefits) are usually regarded as expressions of the value of the tourism/recreation experience to users. While various measures exist to determine user values, it is generally agreed by economists that the most efficient studies regarding economic value (benefit) of tourism attractions is a willingness to pay for the experience.

In private tourism and recreation operations, the willingness to pay is the result of a combination of revenue paid for the cost of primary attractions and services, in addition to other types of costs (time, distance traveled, etc.). In publicly provided operations,

where there may be little or no fee, a willingness to pay is estimated through the use of time and dollar value, as well as the costs of other foregone opportunities. Techniques used in estimating the value of recreation-oriented attractions to users include simplistic models such as the Economic Equivalency Index, which is based upon the number of participants (NP), number of participant hours (PH), a minimum wage factor (MW) and an adjusted age factor (AF). The EEI formula ( $PH \times NP \times MW \div AF = EEI$ ) produces a simulated value of the use of tourism and recreation attractions by visitors.

The U.S. Travel Data Center has a well developed system referred to as the Travel Economic Impact Model (TEIM). This model is aimed at providing annual estimates of U.S. domestic travelers' spending on a consistent basis for each state and the nation. TEIM estimates start with travel expenditures in the benchmark year beginning in 1977, with the U.S. Bureau of Census conducting a national travel survey and census of service industries and retail trade. These provide data on travel activity and the structure of the travel industry. The data used in TEIM estimates are derived from various modes of travel (air, bus, rail, etc.), state industry sources, government data and U.S. Travel Data Center sources. Some other involved and statistically-oriented models include the

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*Note: For use in this article, the term "tourism attraction" is used to include all public and private recreation areas, facilities, services and special events which maintain the magnetism to draw people from other areas in which they live.*



Monmouth County, NJ, Department of Tourism

*Over eighty percent of New Jersey's revenue from tourism each year is the result of coastal resource use such as the resort city of Long Branch.*

travel cost method (TCM) which is based on observed behavior, the contingent valuation method (CVN) which is based upon responses to hypothetical situations and the Hedonic Travel Cost Method which estimates the demand for and benefits of a tourist attraction to users.

Attraction benefits of a recreation nature are concerned primarily with the allocation of resources in providing tourism services. Studies in this area have been developed so as to more efficiently allocate funds for the provision of the tourism experience. Much of the concern with these types of studies have been focused on the attainment of attracting economic efficiency. Economic efficiency is achieved when the value of what is produced by any attraction exceeds by as much as possible the values of the attraction used.

Benefits are another name for the value of what is produced, while costs are the value

of the attractions used. Costs include management capital, manpower and attraction resources. It may also include the missed opportunities of other types of resource uses of the attraction as well as initial acquisition, protection and operation payments.

Regional economic benefits, which are also known as secondary impacts, are benefits which accrue to local areas as a result of expenditures by tourists as well as other revenue generated by the existence of major attractions. It is often at this stage that the best case is made for justifying the existence or expansion of tourism services.

Numerous studies have been conducted which have examined the impact that tourist expenditures have contributed at the regional level. Many of these studies have been merely surveys of gross expenditures. While such studies do render some merit from an accounting standpoint, they do

not demonstrate the real value of tourism on regional economics. The question at the regional level is not one of gross expenditures, but of net value. The discovery of net value is the result of the examination of direct (primary and secondary) and indirect revenues and expenditures.

## Identifying Regional Economic Indicators

Even in a nation which is becoming more dependent on a tourism industry, it is still difficult for both private and public recreation-related organizations to justify the existence, development or expansion of such operations. Tourism-related managers, whether they are in public agencies facing budget problems or private organizations negotiating development and/or operational plans with regional planning and zoning boards, need to have a firm understanding of what the economic benefits of their attractions are to the local area. Some of the following suggestions are recommended to assist in financially justifying these attractions:

### 1. Identifying Direct Primary and Secondary Benefits

Primary attractions are easily identified by the degree of "magnetism" which will draw visitors to a region. Managers of recreation, historic, cultural amusement and environmental resources, as well as special events, need to begin to accurately demonstrate what types of initial revenues these attractions generate.

Secondary (support) services such as lodging, food and beverage, transportation, retail trades and municipal services are equally as important but are often overlooked as contributing economic factors. Table 1 illustrates the major types of direct economic indicators.

In fee-oriented attractions this begins with gross revenues expenditure analysis. For those attractions without fees, it is a matter of selecting one of the many simulation models which have been developed over the years, some of which have been previously mentioned. Managers need to be realistic as they continue to look at total regional impact, and understand that endeavors in any type of information search will require preliminary education and motivation activity regarding outcome benefits directed toward the operators of private attractions and support services in order to prompt them to release financial data about their organizations. In past years this type of information has been very difficult to obtain.

## 2. Employment

The number of jobs generated as the result of a thriving tourism industry, whether full-time and seasonal/part-time positions generated as a result of primary attractions or created indirectly from regional retail and production industry, bring new dollars into a local economy. Usually, the balance of these revenues are retained in the region. Managers utilizing this method of justification can use existing methods for estimating employment growth, as they are usually in direct

proportion to direct and indirect sales created by tourism development.

## 3. Indirect Benefits

The difference between revenues derived from primary and support sources, and the adjusted regional value of a tourism industry is found through the identification and inclusion of indirect benefits. In essence, they are a hidden economic value of a tourism industry. Indirect benefits are a measure of the secondary effects of the actual expenditures by individual consumers and the operation costs of the attractions they visit. They are the regional economic impact of business outputs or sales, employment, net income, tax revenues and government spending. The essential idea is that primary expenditures, due to consumers' spending and attraction operating costs, become secondary gains, in part to the regional economy supplying tourists and

attractions with goods and services.

The most important concept with respect to regional indirect benefits is the **multiplier**. It is defined simply as the total revenue effects (direct and indirect) divided by the inverse (or reduction) of value added. What this means is that the total direct and indirect sales are divided by the percentage of leakage of regional revenue. Leakage is the amount of revenue which is either saved or spent out of a region and not put back into the local economy. Value added equates to the actual direct and indirect funds which are put back into the level economy, (multiplier =  $1/1 - \text{value added}$ ).

Indirect benefits include sales and other business activity in the region, as a portion of tourist dollars spent and re-spent, leading to a multiple increase in the sales of all businesses. As a general guideline,

**TABLE 1**

### Examples of Direct Economic Indicators

Primary Attractions	Secondary (Support) Services
Recreation Facilities and Services (parks, golf courses, tournaments, ski areas)	Lodging (hotel, motel, campgrounds)
Historic Operations (historic sites, museums, buildings)	Food and Beverage
Amusement Services (theme parks, boardwalks, fairs)	Transportation (rail, air, major throughways)
Ethnic/Cultural (cultural regions, sites, buildings)	Retail Trades
Environmental Areas (national parks, estuaries, mountains)	Municipal Services (parking, public restrooms, concessions)
Special Events (parades, road races, fairs, festivals)	

regional output or sales multipliers for expenditures on tourism-related goods and services have averaged 2.0 and ranged from 1.5 to 2.6 in the United States as we enter the 1990s. Managers do need to realize that multiplier values will change with type of business and geographic location and size.

The most popular technique for estimating the multiplier has been the input-output (I-O) method. This method, as well as similar techniques, involve the statistical analysis of outputs (sales) and inputs (costs) in an effort to determine the net value of a tourist industry. Conducting input-output studies from scratch requires data from business, government and



*A variety of theme parks such as the Six Flags Great Adventure in New Jersey, contribute to the local economy, as well as providing employment opportunities each year.*

*Six Flags Great Adventure*

consumer sources, cross tabulation and verification. Such analysis is expensive and time consuming. Fortunately for many tourism and recreation agencies, there have been some more readily available models developed in recent years which have reduced some of the difficulties that often prevented this type of economic evaluation from taking place. By way of example, two of the newer, easier and less costly procedures to use include the U.S.D.A. Forest Service's Implan System and the RIMS II (Regional Input-Out Modeling System) which has been developed by the U.S. Department of Commerce, Bureau of Economic Analysis (BEA). Each of these, as well as a few similar models, rely on prepackaged input-output tables for individual states and regions, categorized by industry output, wages and salaries, and employment. While these models are not problem free, they do make it more desirable for many agencies to begin to identify indirect economic values.

#### **4. Tax Revenues**

Research has demonstrated in recent years that an average of 15 percent of local and regional taxes are generated as a result of tourism and recreation business activity. Many of these taxes are additional contributors to already existing property, sales and income tax. Other taxes are created as a direct result of the tourism industry including amusement, room and meal, fuel and real estate transfer taxes. Managers need to spend time identifying the impact of tourism on traditional taxes as well as the potential development of new and creative taxes as a way to supplement the cost of tourism services and to mitigate general cost of living increases. Table 2 provides an overview of various types of tourism-induced taxes.

#### **5. Land Values**

The impact of both private and publicly-owned tourism and recreation land and water resources on adjacent property values have been a source of study for over 100 years. Such studies have demonstrated that



these resources can render positive, negative or virtually no impact on nearby lands. The actual type of impact rendered is based upon the nature, location and intensity of the recreation activities.

Also of interest is the fact that land values may change at different stages of development and use. A study of Great Adventure Theme Park in New Jersey revealed that surrounding land values increased prior to and during the construction of the park. However, after the park was in operation, land values fell back to original values, and in some cases to a reduced value.

Studies reveal that most impacts on nearby property values will normally occur on properties 2,000 to 4,000 feet from a tourism and recreation resource. Secondly, managers need also to investigate the indirect effect generated by maintaining such resources as general tourism and recreation space. Post benefits associated with this concept have included reduced development and the related savings of school, police and fire, street maintenance and garbage collection costs.

#### 6. Business and Social Factors

In addition to the specific indicators listed above, there are a number of business and social related economic impact potentials which managers should examine and use in justifying recreation-based tourist attractions.

Many of the same attributes which draw tourists to a particular region also serve as the catalyst for motivating various business and manufacturing firms to relocate to such areas.

The annual operation and maintenance costs of tourist attractions also contribute to both regional business activity and personal income. The rental of certain attractions (parks, buildings, etc. ) during off-season and off-peak times are another source for additional revenues. Rental activities include weddings and other social affairs, regional and national conferences, and serving as the setting for movie and television filming (pictures and commercials).

Lastly such attractions can often be attributed to the reduction in regional juvenile delinquent crimes by providing both recreation and employment opportunities to fill leisure time. From a cost/benefit perspective, the cost of public investment directly or indirectly into these types of opportunities are often less expensive than the cost of special law enforcement services directed at this group.

An article of this nature can

in no way fully explore the nature and level of the economic impact of a recreation-oriented tourism industry on a regional economy. Numerous studies, each with different goals and methodologies, continue to be conducted in determining the most important indicators of economic gain from the tourism industry. While the technique for valuation changes with each type of study, the major areas outlined above are those in which most economic impacts occur, and are the areas that managers of both public and private tourist attractions need to more fully explore in the quest for economic valuation.

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**TABLE 2**

#### **Tourism-Induced Taxes**

##### **Federal Tax**

Federal Income Tax  
Land and Water Conservation/Historic Preservation Tax  
Dingell-Johnson Sport Fishing Tax  
Pittman-Robinson Excise Tax

##### **State and Regional Tax**

Local and Further Real Estate Tax  
Sales Tax  
Amusement Tax  
License and User Fees (hunting, fishing, boating, ORV's)  
Gasoline and Fuel Tax  
Room and Meal Tax  
Real Estate Tax (transfer, occupational assessments and privilege taxes)  
Alcohol Tax

# Servicing Visitors in the National Parks

by Brian J. Hill

**D**on Hummel's book *Stealing the National Parks* (1987) provides a viewpoint with which most natural resource managers may be unaccustomed. This viewpoint from a National Park Service concessionaire promulgates the free enterprise system, including desires for personal profit, and visitor desires for creature comforts.

The issues raised about concessionaire profitability and visitor access present another dimension of the impact created by the desire for park use by domestic and foreign tourists. A closer examination of these issues may offer information to the realms of difficult policy decision-making.

Recent information about changes in visitor access and concessionaire financial interests conflict. An examination of recent information available on National Park Service (NPS) access and concessionaire relations include the areas of (1) access concerns, (2) concessionaire financial interest, (3) Park Service viewpoints and (4) temporary as well as (5) more permanent solutions.

## Visitor Access Concerns

### Carrying Capacity

The notion of establishing some social carrying capacity for each park unit was embraced wholeheartedly by the National Park Service in 1978 (Pritchard 1986). Each unit has been required to determine its carrying capacity level of visitors. Since that time the

validity of the concept and researchers' ability to quantify it have been called into serious question. Concessionaires rightly balk at this strategy to limit visitor access.

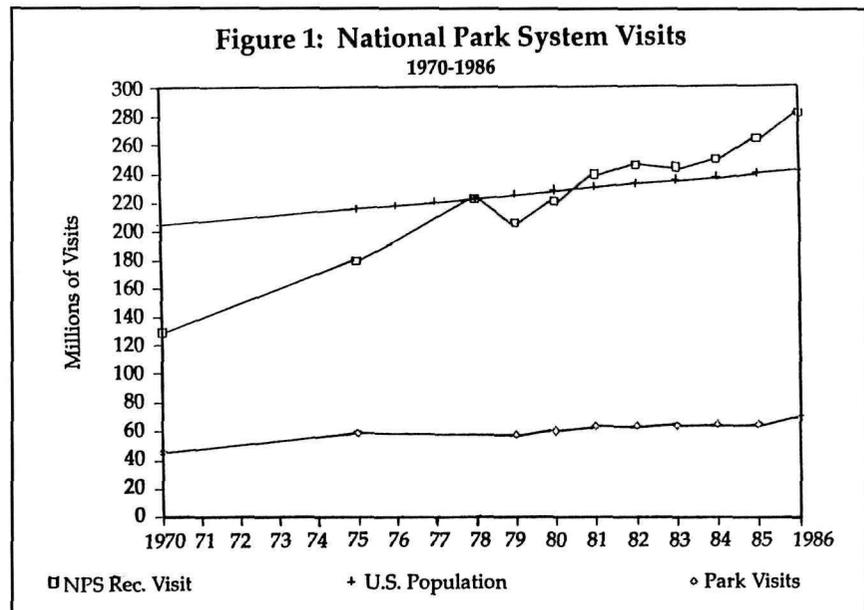
At present, limiting visitors due to demand exceeding established carrying capacity has not become a general usage. Backcountry use in places like the Grand Canyon and Great Smoky Mountains is limited by a permit system requiring reservations for overnight campsites. An attitude that favors limited access to National Parks is present within the system (Bultena, Albrecht and Womble 1981), though the extent of the attitude is unknown.

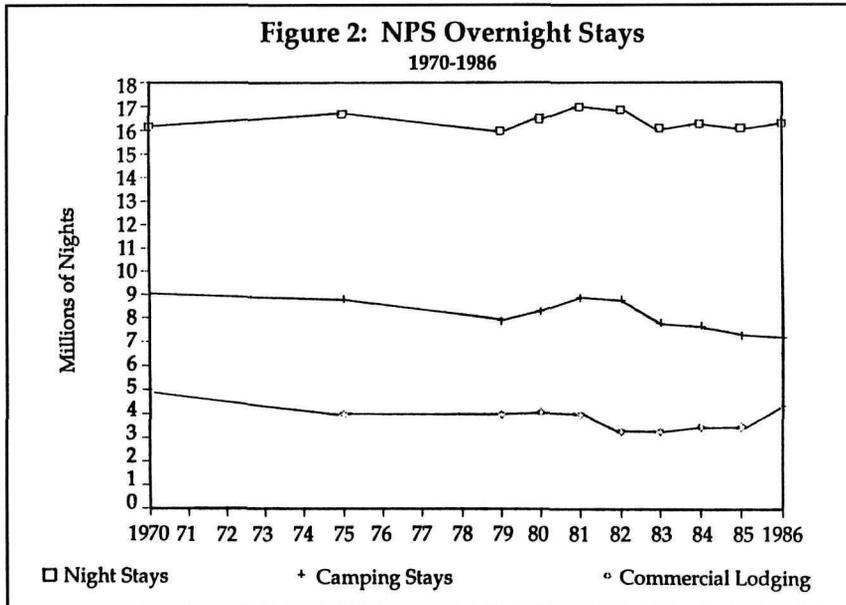
### Park System Visits

Regardless of the attitude of park managers, the actual number of visits to the National Park System has grown steadily since 1970 (U.S. Department of Commerce 1988). Figure 1 illus-

trates the changes in recreation visitation to National Park system sites and parks, and compares these figures to changes in the U.S. population over the same period. Total recreation visits to the Park System increased 17 percent from 1978 to 1986. During the same time, population rose just 9 percent. Visits to national parks increased 21 percent from 1979 to 1986. The average growth in the three most recent years is nearly 5 percent annually. Growth at urban parks has increased at an even faster rate. Citizens are not being denied access in any empirical way.

Despite these statistics the same source alarmingly demonstrates a decreasing number of overnight stays (see Figure 2). On the one hand, this decrease may be due to a change in personal taste (Wagendonk 1981). Significant change in the number of overnight campers coupled with a relatively steady





number of stays in commercial lodging suggests that fewer visitors prefer to camp. On the other hand, the decrease may be due to policies and programs that discourage accommodation development and overnight visits.

#### Minority Access

As reported by the President's Commission on Americans Outdoors, inadequate transportation is a barrier of access to all recreation areas. Accessibility to recreation sites is a major problem for ethnic groups, the handicapped, children, the elderly and the poor (the Report of the President's Commission on Americans Outdoors 1987; Fromer 1982). Although access for minorities continues to be a problem, it is not a new problem. Awareness of the problem is slowly encouraging development of solutions.

### Concessionaire Financial Interest

Concessionaire activity in national parks and interest in preservation predates even the establishment of the National Park System. Initially, railroads and other businesses competed to provide visitor services. Over time, the concession rates and services have been regulated by the Park Service, and the concessionaire is protected from competition and guaranteed a steady flow of customers. Concession business has always been precarious with returns of investment rarely over 5 percent (Everhart 1972).

#### Possessory Interest

The Park Service has undoubtedly used contract abrogation to purchase existing possessory interest of service facilities. In recent years, the philosophy that the government

should assume actual ownership of concession facilities (possessory interest) has gained ground. This concept is extremely unpopular with concessionaires, who believe that they are protected from such policy by the Concession Policy Act of 1965.

Charging General Host, the conglomerate Yellowstone National Park concessionaire, with unsatisfactory service, the Park Service forced General Host into negotiations in which the entire operation, including possessory interest, was purchased by the Park Service. Similar actions have been taken at Zion National Park, Bryce Canyon National Park, the North Rim of the Grand Canyon and Everglades National Park. Although new concession contracts have been granted, possessing interest in service facilities has been lost to successors (Everhart 1972).

#### Organizational Comment

At a 1985 hearing before the Senate Subcommittee on Public Lands, Reserved Water and Resource Conservation (1985), the National Tour Association (NTA) and the Conference of National Park Concessionaires (CNPC) were invited to comment on the management of the parks and the relationship between tourism and the parks. NTA management expressed concern over prospective limits to park admission and increases in park entry fees. They emphasized the access motorcoach tours provide for senior citizens, handicapped travelers and lower-income groups. CNPC

also seriously objected to any visitor limitations. The fact that concessionaire profit margins had recently risen to an average of 8 1/2 percent was mentioned. It is worth noting that concessionaire profitability was on the rise in the early 1980s.

Neither of these groups complained about relations with the National Park Service. In fact, they stressed that this relationship had improved greatly over recent years. Both NTA and CNPC looked forward to building a team relationship with then Director William Penn Mott in accord with his Twelve Point Plan. Official comment from these private sectors indicate general approval of policy and management, but showed concern for any limit to visitor use. Financial hardships for concessionaires were not substantiated from these reports.

## Park Service Viewpoint

According to a recent report (Joyner 1986), the NPS Concession Management Division has been working closely with concessionaires over the past few years in a cooperative, businesslike manner. Franchise fees have increased significantly from \$4.7 million in 1980 to \$7.6 million in 1985. These fees are an indirect measure of concession profit-making. A pilot program to test concession management of campgrounds was established, demonstrating a lack of ire between the groups. From this official perspective, the NPS and concessionaires are doing

business without difficulty, and concessionaires are not being systematically shut out from the parks.

## Visitor Access and Services Policy

An examination of the issues revolving around visitor policy must first consider the underlying assumptions underpinning current thought on the subject. One basic assumption is that as the number of visitors increase, the deterioration of the resource likewise increases. This assumption is generally acceptable, although specific cases may prove otherwise.

The issues at hand are formidable. They reach back to the legislation in the National Park System Act of 1916 requiring parks to be preserved for future generations and to be

open for the enjoyment and benefit of all. How can parks be preserved unimpaired and used for enjoyment at the same time? Controversy has surrounded any attempt to manage through this paradox. Providing services for visitors degrades park quality. Limiting access to preserve the resource reduces this opportunity for others.

Turning travelers away from the gates of their national heritage is intuitively disconcerting to all but the most misanthropic. Certainly, technology and planning can deal with the problems of crowding and physical degradation and mitigate their impacts. The parks were set aside for the benefit of the nation; it seems that the justifications for closing their doors may be handed down too lightly at times.



Harold J. Nolan, Jr.

*Concessionaires and other private business interests provide both a valuable service as well as a potential problem to tourist regions.*

Another dilemma also clouds and complicates these policy decisions. Should visitor services be provided to cater to needs and wants, or should the accommodations provided attempt to furnish visitors with some new experience they may not have initially preferred? Should the experience supplied in our national parks seek to stretch horizons farther than visitors thought they could be? Should the Park Service try to modify the needs and wants of visitors, so preservation will be promoted?

Catering to the needs and wants suggests a marketing approach to the concession business. Providing a product desirable to the producer and requiring the consumer to adapt suggests a product approach. Some might claim that adopting

a product approach to visitor services is a step backwards. In reality, it might be a partial answer to the preservation versus use dilemma.

The base assumption of visitor policy, and the issues and dilemmas that must be considered, have been sketched. A few recommendations for the future direction of visitor access and concession policy are suggested below.

## Temporary Solutions

### Park Expansion

The most obvious method for reducing or maintaining the number of visitors per unit is to increase the number and/or size of units. A 5 percent increase in park visitation suggests a 5 percent addition to the system to retain the status quo.

Particular attention must be paid to urban recreation areas where usage is most likely to expand rapidly.

### Diverse Use

The parks are for all people whether they be visitors with minimum mobility such as senior citizens, families with small children or active environmental elites. A system that manages and develops diverse areas for each diverse group will be providing access for all Americans. A continuum of development could be implemented from small tourist ghettos to pristine wilderness. Providing separate areas for each group may also avoid user conflict. This type of plan provides for access, but must be used in conjunction with other measures to protect the environment.

### Technological Mitigation of Undesirable Impacts

Despite the preoccupation with carrying capacity, a great number of programs and developments can be utilized to mitigate negative impacts and greatly increase carrying capacity. Decked walkways, banistered long-distance overlooks and ecological rehabilitation projects reduce the impacts to fragile environments. Spaced entrance requirements, diverse use areas and facility design can reduce crowding conflicts and increase the number of people who can comfortably fit into a park. Such developments and programs may be financed by concessionaires.



Shasta-Cascade Wonderland Association

*Water skiing rental and instruction are just part of the commercial recreation opportunities on California's Shasta Lake.*

### **Transport Systems**

Tramways and shuttle bus systems may mitigate the effects of automobile congestion and pollution. Exclusive public transportation systems within the park may in fact increase access to traditionally low-frequency users. This in fact provides another concessionaire opportunity as evidenced by the Yosemite National Park experience.

### **More Permanent Solutions**

#### **Education**

Those Americans with little or no information about parks are functionally denied access to the parks. Marketing the parks to such groups advances their access. At the same time, education may be the means of gradually altering the values, preferences and demands for visitor services. No matter what the technological solutions, they will be temporary so long as the insatiable consumer demands more and more luxurious comfort.

#### **Non-Profit Cooperative Concessions**

A further step in reducing consumptive demands could be the institution of non-profit cooperative concessions to gradually replace profit-generating businesses. Parks exist to serve the public; they

have no moral obligation to make money for a small segment of the business world. Associations such as the National Parks and Conservation Association may be interested in providing for visitor services. Their management is likely to develop and encourage values and demands that are less disruptive of the resource.

#### **Use Limitations**

At some future time it seems inevitable that expansions, technological mitigations and value changes will no longer be enough. Use limitations may then be required to preserve the parks for future generations. Lottery systems, perhaps coupled with a fee, may eventually be a solution.

#### **Implications of Recommendations**

The recommendations mentioned will have various successes. Their popularity will each differ from one another. The combination of their impact may enhance the enjoyment the parks offer for years to come or it may fail in the face of an ever more consumptive and disruptive value system. A change in the demand for comfort and luxury provides the most desirable, but perhaps most difficult, solution to the preservation/use dilemma. In the long run, if visitation continues to increase, alternatives to use

limitation will only prolong the day when strict severe access limits will be enforced or the resource will be lost in its unimpaired state.

Visitors may be required to alter their expectations and comfort values. For some, this will be especially disconcerting. Nevertheless, they will not be turned away until all other alternatives have been exhausted and the extreme scenario is a reality.

Concessionaires may be pleased in the short run that visitor access will not be initially compromised, but outraged that their businesses may be phased out. It is not the purpose of the national parks to serve them, but rather the people and the resource.

Temporary and more permanent solutions have been suggested, but their success may ultimately depend on a change in the materialistic, consumptive demands of Americans. The policy recommendations form something of a creative compromise among environmentalists, visitors and concessionaires. None will get to have their cake and eat it, too.

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# Trends in International Tourism Through the Year 2000

by David L. Edgell, Ph.D.

**W**orldwide tourism will be faced with some difficult challenges over the next several years, but overall, the future is bright for travel.

Worldwide population growth, increases in income and income distribution will make it possible for even more people of the world to travel. Changes in work habits and patterns of working conditions will yield greater leisure time for greater numbers of people to participate in tourism and recreation. As people become better educated and have greater exposure to other societies and cultures, they will want to visit the places about which they have read or heard. Communication and transportation technology will continue to revolutionize the knowledge and ability to travel. All these factors suggest that dramatic, positive changes will be in store for tourism over the next several years.

Worldwide travel will be easier and more comfortable for the traveler. Automobiles will still be the principal means for most domestic travel, but they will be highly computerized and fuel efficient. Usage of recreation vehicles will increase, especially as people have more time for short recreation-oriented outings. Airplanes will be bigger and fly routinely at supersonic speeds. Rail and bus travel will continue to improve and grow. For example, "bullet" passenger trains and "magnetic-levitation" trains similar to those being tested in Japan and Germany will be introduced.

Major improvements in hotels will be made toward greater security, increased service and greater emphasis on sanitation, especially in resolving illnesses from food and water. Communication satellites will improve the quality and reduce the cost of international telephone service. Teleconferencing will change some of the ways we approach convention travel and will be used in education and training programs. Restrictions on passports, visas, currency controls and similar obstacles to international travel will be reduced. Increased worldwide tourism will mean greater personal contact and understanding by foreign nationals of the social, political and economic patterns of the destination visited.

Freed by technology from much of life's drudgery, travelers will have time to allow their creativity to work regarding their leisure time. The traveler will have the ability to obtain more information about more destinations through the use of home computers which will have access to data centers and libraries. Travelers will look to sophisticated travel agents to arrange more variety and greater services at the destination. Opportunities for specialized travel, whether it be to rural areas, tennis or ski resorts, education or culture or eventually a trip to outer space will be at the traveler's fingertips. There will be greater availability of multi-lingual menus, currency exchange facilities and multi-language tours. All in all the traveler can look forward to

an improved tourism product.

This rosy picture does not mean the horizon is without problems. However, the big problems which will confront worldwide tourism over the next several years will not be too different from those of today. There will be economic ups and downs, energy problems, food shortages, limited availability of raw materials, disputes over land, air and ocean resources, environmental difficulties and language barriers to name a few. Travelers will have to understand the negative effects of mass tourism — too many people crowded in a small area will cause strains on facilities and sites — and learn to adjust to delays and inconveniences in some instances. In some cases, there will be conflicts and disagreements between travelers and local populations regarding public facilities. However, over the next several years most countries will have developed appropriate policies for resolving the main obstacles to travel.

## The World Travel Market and America's Travel Industry in the Year 2000

In the year 2000, the worldwide tourism industry (domestic and international) which is today the largest industrial sector, generating over \$2 trillion in receipts, will continue to be the largest industrial sector and its receipts will double to at least \$4 trillion. Within this context the following assumptions are offered:

- International trade in tourism, which today generates approximately \$225 billion in export earnings for host countries, will produce over \$300 billion in export earnings by the year 2000.
- The United States will need to be even more innovative in marketing its tourism product because the international competition will include virtually every nation of the world.
- The U.S. travel industry, while still principally a domestic market oriented entity, will continue to look to the international market for growth opportunities.
- Most major international travel markets will mature, even those from the developing nations, and many such countries will be highly dependent on their tourism industries to maintain stability and to provide international currency exchange.
- Tourism will continue to be America's largest services export income earner, and the U.S. share of the international market will grow significantly.
- The number of foreign visitors arriving in the United States is expected to increase from an estimated 40 million in 1990 to 67 million by the year 2000.
- Both leisure travel, recreation and business tourism will grow.
- The U.S. travel companies will continue to be world leaders in the provision of services both at home and in travel markets around

the world, enabling the United States to benefit from foreign visitation to America, American visitation abroad and foreign visitation abroad.

- The number of small-to-medium-sized travel businesses seeking a share of the international market will continue to grow, but the percentage of businesses (particularly small businesses) as a share of the total industry will decrease. Today 98 percent of the total American tourism industry is small business. This may fall off to 80 percent by the turn of the century.
- Improved coordination between government agencies with responsibility for international and

domestic passenger travel facilitation will be required, due especially to the anticipated continued increase in foreign arrivals and the limits in capacity of facilities and facilitation services.

- By the year 2000, visa waiver will be widely implemented.
- By the year 2000, machine-readable visas and passports, scanned at the points of departure and the information electronically transmitted to points of arrival will be commonplace.
- By the year 2000, consolidated inspection services will be available, making it possible to economically handle the anticipated annual



*California's Burney Falls, referred to as "The Eighth Wonder of the World" by Theodore Roosevelt, is the type of attraction which will draw international tourists.*

growth of foreign arrivals.

- The shift in the age of America's work force will not discernably affect the demand for tourism services, but it will seriously affect the ability of the industry to provide these services. The availability of workers capable of filling low-skilled jobs will be sorely strained.
- The ability of America's travel industry to cope with consumer demands, to remain competitive and to be able to respond to the uncertainties of natural resource availabilities will require a higher level of high-tech integration in the delivery of service.
  - Electronic information systems will virtually replace printed materials.
  - Scarcity of fossil fuels will require vastly improved design and efficiency in all transportation modes.
  - Highway, railway and airway design, maintenance and control will require greater sensitivity to the needs of both domestic and international travelers.
  - Outdoor recreation resources will require greater care and protection, ensuring their availability to both domestic and international travelers while fulfilling demands made by other societal and economic forces.

## Adjusting to Change

The English poet Thomas Campbell wrote, before the turn of the century, that "coming events cast their shadows before." By examining some of the approaching shadows cited in the previous paragraphs, we can predict the factors which will shape and change tomorrow's tourism world — and the tourism industry's future opportunities. What do the shadows tell us?

- Today, more than 170 national tourism organizations are competing against one another for a share of the world's tourism business. Developing countries everywhere are encouraging hotel construction, airport expansion, tourism training and improved air service.
  - In tomorrow's tourism world, there will be more hotels worldwide, more international airlines and more competition for the international tourism market.
  - To stay in the worldwide game, the United States will have to offer a competitive product, both in terms of price and quality of services and amenities.
  - Training, education and general awareness will be in great demand to ensure that workers understand the relationship between quality of service and a region's competitiveness as a destination.
  - Demographically the age range of travelers over 50 will show the greatest increases in the travel market.
- There is every indication that the "fitness craze" is here to stay. Travelers will favor active adventure-style vacations with lots of sporting-type activities whether it be on the beach, in the mountains, parks or urban areas.
  - Concern about skin cancer and the effects of prolonged exposure to ultraviolet rays is going to decrease enthusiasm for so-called sunbathing.
  - An increasingly visible segment of the younger consumer market places a high priority on activity-oriented vacations, lean cuisine, lighter beverages with less alcoholic content, diet soft drinks, segregation of smokers and non-smokers, work-out equipment, aerobics, etc.
  - Older citizens who have made the link between longevity, regular exercise and healthier diets, less cholesterol, fewer dairy products and saturated fats, less sodium, less caffeine, more fiber and more calcium will demand that the travel product take those concerns into account.
  - Increasingly, it is becoming evident that there are more travel market segments than most of us realized. There are segments interested in beaches and cruises, but there are also segments interested in sports, night life, steel bands, old walled cities, forests, historic



National Park Service

*The viewing of winter wildlife is just one of the many opportunities which draw tourists to rural regions.*

homes and gardens, churches, cultural diversity, festivals, natural wonders, ruins, shopping and gaming. Thus the travel product must provide variety.

- While some people seek escape, adventure or physical activity, others travel because it gives them the opportunity to be with other people to learn about the past, to find out about their "roots" or to bask in luxurious surroundings.
- Unification of the European

Community's Internal Market in 1992 will lead to a moderate increase in intra-European travel, emergence of new airlines as a result of mergers and the establishment of new entrants, and lower intra-European airfares unless congestion puts a ceiling on growth.

## Conclusion

As can be ascertained from this article, trends in interna-

tional tourism through the year 2000 will challenge the tourism industry's ability to change and keep pace with the anticipated demands of the traveler. There are many other trends in international tourism which will take place through the year 2000 which need attention as international tourism grows, but the above cited challenges suggest a beginning agenda for the tourism leadership to focus on, if only in the immediate future. As we learn through our respective tourism experiences to understand the world outside our own, the hope is that as a result of international travel, people will become more tolerant of those attitudes, customs and beliefs that differ from their own. Finally then, future international tourism has the potential to integrate the economic, political, cultural, intellectual and environmental benefits of tourism cohesively with people, destinations and countries in order to improve the global quality of life and provide a foundation for peace and prosperity.

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# Marketing Tourism Into the '90s: Ideas for Facing a More Competitive Market

by Jack B. Samuels, Ph.D.

**T**he 1990s will probably mark the point in time in which the tourism industry clearly moves from an era of success by default to success by excellence. Until recent years we have seen many tourism enterprises and tourism regions succeed simply because there was limited competition. It was much less difficult to succeed. The 1980s saw a pronounced heating up in competition within the tourism industry, as well as between the states. The 1990s will probably be the start of an era of increased competition unmatched in previous history. Tourism marketing wars may be readily apparent during this decade.

Signs of the new battlefields are not too difficult to find. Look at the increased tourism budgets of certain states in the U.S. in the 1980s. Examine what is happening in Central Florida as the Walt Disney Company tries to turn Walt Disney World into a tourism region unto itself, excluding the rest of Central Florida as part of their tourism market. Investigate what is happening with casino gambling and understand that it is likely to be overused as the cure-all tourism magnet of the 1990s and beyond. These items are just a few of the indicators which say we are heading into a very interesting era.

The 1990s will require not only excellent service to survive in a much more competitive marketplace, but also renewed vigor in terms of marketing savvy. Positioning yourself properly in the marketplace and getting your message across to

potential tourists will become paramount to continued success. Every avenue for marketing the tourism attractions will need to be explored and the winners of the contest are likely to be those people who leave no marketing idea untested and spend their marketing dollars most efficiently. Some of the marketing and promotion methods of the 1990s will be extensions of ideas which seemed to blossom in the 1980s, but other activity may be viewed as at least partially new or different. The following are some of the likely marketing and promotional tools and scenarios which are likely to be a part of the tourism industry in the years ahead.

## Governmental Involvement

It is likely that governments will realize the importance of tourism to their economies to a much greater extent. There should be an increase in government spending in the 1990s, and possibly governments both at the federal and state level need to begin to cooperate to a far greater extent with the private sector in promoting tourism. Governments that realize the importance of their efforts in the tourism arena early will enable their private sectors to have the most success.

The seeds to increase promotional efforts on behalf of tourism regions must be planted now if they are to be reaped in the 1990s. Tourism organizations and businesses must begin a much stronger effort to educate the public regarding the

importance of tourism to the economy and make the public understand the nature of work in the industry. This type of effort does not occur overnight, nor do its effects take hold quickly. Winning over public support for our industry will continue to become increasingly important to its success. Those who act now will be the big winners in the years ahead. Increased tourism education programs would enable us to provide the industry with better employees, increased public dollars for promotion and overall better acceptance and understanding of the industry.

## Trade and Industry Groups

Trade and industry groups should take a much stronger role in tourism education in the 1990s. They will also need to promote public awareness of their industry to a greater extent than ever before if they are going to maximize their revenues. The fact that tourism attractions not only compete with each other but also complement each other must be accepted if the entire industry is to see the growth that is possible.

There is likely to be a strong need to have some consolidation of or an increase in communication between the many trade groups which currently serve the tourism industry. The combination of Ski Industries America (SIA) and the National Ski Areas Association (NSAA) into one trade group and their new marketing program might be looked upon as a bold and

correct move by many other tourism-related industries in the not too distant future. The National Recreation and Park Association's "Life - Be In It" campaign might also be looked upon as a proper and needed attempt to raise public awareness and interest in tourism-related services. The Travel Industry Association of America is a good example of an umbrella-type group which can and should increase its activity for the betterment of the entire tourism industry.

### **Segmentation, Diversification and Integration**

As the tourism industry matures and becomes more and more competitive, market segmentation, diversification and integration will continue to increase. In the 1980s we saw interesting segmentation developments in the hotel industry as

lodging companies diversified into a wide variety of products ranging from budget to luxury recreation services. The segmentation of the lodging industry is likely to continue, while other tourism-related industries are also likely to show increasing segmentation as they continue to mature. Those who clearly cater to distinctive market segments in this industry are those who are likely to increase their market share. It will not only be important to identify these segments, but also to be sure that services provided are clearly understandable to the publics they serve.

In the tourism industry segmentation is synonymous with diversification. This is because almost all products complement other products in this industry. The full benefits of the complementary nature of tourism and recreation-oriented products have yet to be realized. Although some attempts at

complementary diversification have been less than highly successful, others are showing signs of increasing success and there is likely to be huge success in such diversification in the future. It is likely that more and more companies will be turning in the future to a mix of tourism-related products such as lodging, attractions, recreational facilities and transportation.

Segmentation brings about greater opportunities for market integration. A mix of different interrelated products will provide greater marketing impact for the future. Perhaps the greatest integration in the 1980s has occurred by the utilization of retailing by recreation and tourism companies. The most significant of these efforts is the opening of the "Disney Stores" by the Walt Disney Company. The growth of these stores has not surprisingly exceeded the original projections of the company by many fold.

The retailing growth is largely fueled by the concept of "licensing." Licensing is giving various manufacturers the right to use the name, trademarks and copyrights of a wide variety of products. The growth of licensing in the '80s has been explosive and is likely to continue into the '90s. The vast majority of all product licensing involves recreation/ entertainment or tourism-related products or services. Licensing can be a powerful marketing tool. Not only does such activity add additional revenues, but it also serves to promote the original products or services that are being licensed for use by others.



Harold J. Nolan, Jr.

*Both private and public golf courses, such as those of Stewart, Florida, may be marketed as a major attraction or as a support attraction to more dynamic tourism activities.*

## Leisurized Marketing

The concept of leisurized marketing will continue to grow in upcoming years. Leisurized marketing refers to the utilization of recreational services or leisure-oriented images and activities to sell a wide variety of products and services. The 1980s have seen the beginning of a leisurized marketing explosion and this development will strongly continue into the 1990s. The leisurized marketing boom brings the recreation and tourism mega-industry to the forefront of marketing. As a result of this concept, we are beginning to control or influence the marketing of most products and services, including those which are not related to our industry.

Leisurized marketing takes many forms, but includes such items as the previously discussed "licensing" as well as trade shows, leisure oriented advertising themes, corporate sponsorships and shopping malls. The driving force behind all of these concepts is that the association of your product, regardless of the type of recreation, leisure and tourism attraction, means that you are associating your product with fun. Fun is a powerful seller!

Although there is some evidence that trade and consumer shows are relatively costly and ineffective for actually increasing sales, they may in the long run be highly important to the marketing effort. Few people go to such shows with the idea that they are going to have a negative experience. Although direct sales may not

actually be produced at trade shows, it is not really known how effective they are in producing sales in the long run and may be highly effective in this regard.

Leisure-oriented themes in advertising are becoming more and more prevalent and recreational services are being used to sell products and services of all types. This is not only being achieved via the utilization of recreational themes in advertisements, but also via a proliferation of corporate sponsorship of recreational events, and tourism attractions and the development of promotional characters or other devices which garner the public's attention.

Open any issue of various consumer magazines and examine the number of ads which give focus to a recreational activity, product or service which has to do with the tourism industry. Many of the magazines which are successful deal with recreational or travel activity. There is diversity among the people who buy these products and services so other advertisers find it profitable to provide services via these specialty magazines.

During the 1980s corporate sponsorship became an established part of the marketing environment and it will continue to proliferate to an even greater degree in the years ahead. Regardless of whether you are running a major recreational event, a tourist attraction or creating a festival of some sort, obtaining corporate sponsorship will be highly important to its success. Corpo-

rate sponsorship of events generally comes about in two different ways. In some cases the sponsor looks to create an event which meets its product's image, while in other cases the sponsor of the event looks for corporate sponsors. Regardless of who is the originator of the sponsorship activity, these unique partnerships make great marketing and fiscal sense and will continue to grow in years ahead.

The creation of a mascot or theme characters goes far in the tourism field. If your company or organization does not have several of these for the '90s, you are losing out on a valuable promotional tool. Not only can these resources be used directly for promotional purposes, but their images can be licensed for use on countless products which become promotional devices. Sometimes these promotional devices are not mascots or characters, but they may take the form of special vehicles, buses, airplanes, hot air balloons, floats or other things which can easily be moved around and exposed to large segments of the population.

Perhaps the ultimate "leisurized marketing" concept is that of the shopping mall. Today the shopping mall means fun for everyone and the fun the mall provides is the mechanism which sells merchandise and makes the mall a success. The enclosed mall was the "leisurized shopping" development of the 1970s. The food court was the phenomenon of the '80s and the '90s will see the mall become a complete family amusement park.



Harold J. Nolan, Jr.

*Well designed and maintained signage provides a multipurpose marketing tool directed toward tourists visiting a particular region.*

Although this concept met some early failures and there may be some problems with its long term success, the "themed family amusement area" will become an integral part of shopping malls in the 1990s. The megamall, complete with an indoor water park and amusement park in Edmonton, Alberta, Canada, currently draws people on a regular basis from as far as 2,000 miles away. As the megamalls with these facilities become more prevalent, they will become more of a local/regional recreational center than a tourist attraction. Their impact as a tourist attraction could prove to be interesting as they begin to compete with other existing attractions.

Shopping megamalls may eventually take on a much stronger role as a place where people further explore their leisure lifestyles. They may offer an even greater array of recreational activities and also a

greater variety of services which help people select travel and recreational opportunities. We might see stores with various representatives from tourism service companies and promotional organizations promoting their products and services to consumers in the megamall of tomorrow as it becomes a potential tourism/recreational clearing house for the community.

### **The Service Element**

Service management is not new to most recreation professionals in the public sector. However it has become one of the management tools of the tourism industry in the late '80s, with a greater understanding of this concept in the 1990s. Educators and practitioners involved in recreation programming from a service delivery system viewpoint is very familiar with many of the points

now being espoused by the growing proliferation of service management consultants.

It is important to realize, however, that service businesses must not only be managed in a special way, and that good customer service is an important part of the marketing effort in the tourism industry. Determining what types of customer service is most cost effective will become a paramount issue to the tourism industry in the '90s. Knowing which customer service frills garner the greatest consumer loyalty will be important to success.

### **Tourism and Recreation Industry: The Root of All Success**

Perhaps the battle cry for our industry into the '90s is that fun and hospitality sell. We can and should realize that we are a strong marketing force in the world. We can contribute to the success or failure of our products and services as well as contribute greatly to the success or failure of many other products and services which are not directly involved in this industry. As we become an increasingly competitive industry, development and understanding the relationship of all of the tools at our disposal will become paramount to success.

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# International Travel and National Parks: A Japanese Example

by Joseph T. O'Leary, Ph.D., and Francis A. McGuire, Ph.D.

**"G**rowing interaction and interpenetration between hitherto relatively independent social systems is one of the most salient characteristics of the contemporary world (Cohen 1979:180)."

Travel and tourism has become one of the most important businesses in many parts of the United States and the world. For some regions and states, this service industry leads all other economic activity. In the summer of 1987, vacation travel totaled more than 295 million person trips in the United States with a projected 1988 increase to 305 million (Cook 1988). The United States is also seen as an attractive place for people from around the world to visit. More than 10 million international visitors came to the United States in 1987 with sharpest increases between 1987 and 1988 coming from Japan (+27 percent), the United Kingdom (+31 percent) and West Germany (+31 percent). International travel to the U.S. is at all time record highs and is projected to continue that increase (Wynegar 1988).

In recent years the character of the U.S. travel industry has undergone significant changes as a result of the highest levels of domestic travel in history and the burgeoning rise and interest in attracting the international traveler. For some areas, a greater number of international visitors simply adds to the numbers that have visited in the past; for many other places and businesses these groups represent a market or an opportunity that could provide economic

and social advantages.

The current position of the U.S. dollar, baby boomers reaching prime age for travel, deregulation of the European airlines, more public/private sector initiatives promoting the U.S. and some suggestions about a move toward global mixing underscore why projections for future growth in this area are made. In response to this multi-billion dollar opportunity, attempting to understand the structure of the international travel market has become an important activity for both the public and private sector.

Since the flow of travelers from Japan has been on the increase and since government policy in that country appears to favor maintaining that growth, the discussion in this

article about the foreign traveler will focus on Japan. In the initial review of important factors that influence a person's interest in travel, 60 percent to 75 percent of the Japanese indicated the importance of seeing national parks and forests on their trip. Since this was such an important trip factor, an additional area-interest in national parks and forests will also be included.

## Age and Participation

Age of the traveler influences activities chosen and benefits sought and is a key concern for a number of organizations. Although international travelers may not exhibit the same patterns of travel associated with U.S. age groups, understanding the differences



California Division of Travel & Tourism

*The variety of outdoor recreation opportunities, such as fishing on California's Sacramento River, attracts a variety of international tourists to the U.S. each year.*

relative to the U.S. market could be important, particularly for resource management agencies that are not as sophisticated as their private sector counterparts in looking at market segments for domestic populations, much less international visitors. The Japanese age pyramid is similar to that found in the United States about ten years ago. There is an aging population, with the average age expected to increase in the future.

Although it would be novel to argue that resource management agencies in this country pay particular attention to variables that describe visitor populations (in general they don't), age categories suggest important life periods that influence the way in which management, even by accident, will see their users approach the system.

This response of the agency to an American clientele probably provides the basis by which they will approach the international traveler.

If international travelers demonstrate similar patterns, the agency response (with all due respect to cultural differences) might be successful. If the responses are different, then international visitors might represent a totally unique group that must be handled in a distinctive way. That is not always the easiest thing for the agency to cope with, but it will represent the response that will be necessary if the agency is to be successful.

## Methods

Data from the U.S. Travel and Tourism Administration

and Tourism Canada sponsored Pleasure Travel Markets survey for Japan were examined to identify similarities and differences between age groups across the life span. This data set for Japan provided information on:

1. Demographic profiles
2. Trip and travel party characteristics
3. Activities engaged in on the most recent trip
4. The dominant benefits sought in overseas travel
5. The relative perceptions of the United States and Canada.

Personal, in-home interviews were conducted in the Japanese market with 1,519 persons. Respondents in each country were those 18 years of age or older who took an overseas vacation of four nights or longer in the past three years or who intended to take such a vacation in the next two years.

The variables examined include activities, important features that influence travel and responses about U.S. travel destinations. Persons are identified as visiting a national park or forest-based resource in their response to the question on activity participation.

## Results

### Age Patterns

Examination of all those interviewed shows that the highest percent of those indicating that they travel are in the 22-28-year-old age category. Comparing all travelers with those who indicate that they visit a national park shows that



Harold J. Nolan, Jr.

*The Popular Sea Lions Cave along Oregon's Mid-coast Area is a commercial natural attraction which creates a pull factor to attract international visitors each year.*

the 22-28 age group is again the highest followed by those 29-36 years of age.

However, those in age groups between 44 and 75 years of age are also more highly represented in national park interest relative to all travelers. What is important in looking at this older group is that they represent almost 50 percent of those who travel. While they do not show the high modal response that the 22-28 group exhibits, the group certainly represents an area of interest for those in the land management organizations.

### **Activity Participation Across the Life Span**

The top five activities identified in the initial reports of the international surveys were sightseeing in cities, shopping, dining out in restaurants, guided excursions or tours and visiting scenic landmarks. These also represent the same basic mix of activities identified in the analysis that was done for persons indicating that they visited a national park or forest.

The patterns associated with each of the activities show that for the two most popular activities—shopping and sightseeing—age appears to have little effect on participation. This same argument could also be applied to dining out at restaurants, although there appears to be more variation in the age distribution.

When the other activities are examined, it would appear that there are some that are as-

sociated with younger travelers (e.g., attending concerts, festivals and sporting events; taking pictures), others with middle aged persons (e.g., fishing, golf and tennis, casinos and gambling), and finally a few activities that appear to interest older travelers more than the others (e.g., visit historic places, scenic landmarks).

In each instance, it is difficult to determine exactly what constitutes the specifics of the activity identified. For example, shopping by a younger person may not be perceived as the same done by someone older. It is even possible that visiting amusement or theme parks ought to be examined in greater detail to determine differences that might exist between visitors of different ages.

### **Important Reasons for Taking a Trip**

Various reasons were expressed by Japanese travelers for taking an overseas vacation trip. The responses are a combination of the two categories “very important” and “somewhat important.” Similar to the pattern found in activities, there are five key reasons identified by a very large majority for traveling — learning new things and increasing knowledge, seeing as much as possible, change from a busy job, experiencing new and different lifestyles and trying new foods. Age differences in responses are modestly different for these leading travel reasons. However, there are some important

themes that emerge.

First, change from a busy job is very strong among those in their latter 20s through 50 years of age. Similarly, for those in the early family stages, a very strong pattern is apparent for doing things with their family. Younger people are into rediscovering themselves and adventure is clearly a dominant and important theme. Older people are sensitive to factors like feeling at home away from home, in meeting people with similar interests and in having the opportunity to talk about the trip they’ve taken after they’ve returned home.

The patterns shown in the data again underscore the need to pay particular attention to the age differences evident in the analysis.

### **Top Five Places to Visit in the United States**

The Japanese view of places to visit in the United States is focused on the mainland West Coast, both in terms of region and specific places. This response is evident for both non-queued (spontaneous response) and queued (chosen from a list) responses to places in the U.S.

The top five places identified were: the West International Marketing Force (Washington, Idaho, Alaska, California, Oregon and Nevada), California, Pacific (Alaska, California, Oregon, Washington), San Francisco and Yosemite National Park.

In the queued effort Mountain (Arizona, Colorado, Idaho,

Montana, Nevada, New Mexico, Utah and Wyoming), and Foremost West (Wyoming, Colorado, New Mexico, Utah and Arizona) were added to the top five with San Francisco and Yosemite National Park dropping out.

When choices are identified there is some evidence that age differences play at least a small part in distinguishing the responses. The distribution by age of the West International Marketing Force shows interest to be distributed much like the age distribution found for Japanese travelers.

However, when this is examined vis à vis national park visitors and all visitors, it is clear that there are some differences within the age groups that might be worthy of further attention. Younger and older national park visitors appear to be more interested in these areas than those in the middle age categories.

Similarly, when we look at the age distributions for the same two groups in relation to Yosemite National Park, we also find some slight differences within the age groups, particularly for those in the youngest categories and those 44 to 60. This is consistent with the data reported in the activities section of the analysis.

Additional interpretation of the information needs to be done on the places reported by Japanese people to determine whether other larger or smaller differences become apparent. It may also be important to determine why places like Hawaii don't show up higher in the lists of places to visit.

## Conclusion and Implications

International travel by the Japanese is on the rise. On the one hand, the government views foreign travel as a way to address the balance of trade issue and has established significant targets for the numbers of people who will travel outside of the country. On the other hand, Japan is an ascendant economic power whose citizens have one of the largest per capita disposable incomes in the world. The U.S. has a service infrastructure that should be able to accommodate the large numbers of Japanese travelers.

However, we must continue to obtain knowledge about these visitors if we are to take advantage of their large numbers. Interest in various activities is age related. Whether one chooses to use the age categories that are in this article or use similar studies, interest distribution will be found to vary. The same argument can be made for benefits sought, which appear to be even more strongly age based.

One way to approach age differences and the Japanese tourist might be to simply use a categorization like young, middle age and mature. This appears to be a useful way to look at activities and reasons for travel, with some suggestion that places chosen also are related to this arrangement.

However, since differences across the age span were found for Japanese tourists, the question to be answered is

whether this same pattern exists for all the countries for which studies have been done (13 countries as of this writing).

There is broad-scale interest in national parks and forests by Japanese travelers of all age groups. What is curious about this interest is that it is not translated into recognition and action when the Japanese traveler thinks about places to visit in the mainland. Since there is also broad-scale interest in scenic opportunities, the marketing of public lands appears to be a priority, particularly on the West Coast.

The earlier studies done by Smith (1988) showed that Japanese travelers used a very limited set of contacts to help them make the decision about travel plans. This information certainly would represent a key starting point to raise the consciousness toward natural areas as part of the itinerary. It must be realized, however, that data clearly show that travel is viewed as a multi-faceted experience including many activities directed at several sought-after benefits. The challenge for those in public agencies and private firms will be to determine how to address these interests in a way that is most cost effective, considers resource impacts, incorporates service opportunities and makes allowances for the social interactions. Social impacts in particular need to be studied, but rarely, if at all, have there been efforts to do this in terms of a specific origin group like the Japanese.

The original reports about the Japanese results suggest that

the age group that should be most likely targeted are those under the age of 35. There is a significant contribution made by young secretaries and honeymooners in their twenties to this highly involved traveling group. While this youthful group might represent approximately 50 percent of those who are interested in travel, there are almost another 50 percent who are older than 35 who also express interest in U.S. travel.

Additionally, if the intent of these survey efforts is to prepare both the public and private sector for the future, then the recommendation is shortsighted. Changes in the age distribution of Japanese society are similar to those found in the U.S. There is a growing number of older people and the proportion is expected to increase; retirement age in Japan is usually 55, and there will be more people in that category in the future.

Further, there is a declining number of younger people and that is also expected to continue; those in middle age will become an even more important part of the traveling population. Examining the opportunity to address an aging population might be a more appropriate

planning strategy. An additional question is whether the high propensity to travel identified in the younger age groups will carry over into the future as they age.

Although the focus has been on national parks, there are clearly opportunities for other public and private attractions that offer places to visit. Similar to the argument about information being placed in the right place at the correct time, these other opportunities could possibly find a receptive audience. The interest in parks and forests combined with shopping, dining or cultural experiences could provide exceptional revenue-producing situations.

However, there are some interesting anomalies in these data that need to be looked at in greater detail. One of the key questions that arose in the analysis of these data came from the information on amusement and theme parks. Our expectation was that Disneyland in California would represent one of the most strongly identified areas. In fact, it showed up quite far down the list. Reasons for these differences in motivations need to be examined more closely.

One of the important

issues for resource managers to consider is the role public lands and particularly the national parks should play in the tourist experience. There have been several reports that suggest that many of these areas are under stress. Yet it appears from the data that they present an opportunity in the United States to provide even more flavor to the tourist experience. The "Selling of the National Parks" as a place to visit in this country has tended to focus on the "crown jewels" and less on other places. Is it possible that the focus should be directed to other attractions and away from resources experiencing such problems? Consideration needs to be given as to the best way to accomplish this task while still providing the experience sought by the traveler. Unless this research begins soon, the decisions might be done by fiat, which could have some interesting repercussions.

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