<table>
<thead>
<tr>
<th>Title</th>
<th>The travel and tourism industry.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Author(s)</td>
<td></td>
</tr>
<tr>
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The Travel And Tourism Industry
TRAVEL & TOURISM

THE WORLD'S LARGEST INDUSTRY
Introduction

This is the second annual WTTC Report on the contribution of Travel & Tourism to the world, regional and national economies. It shows the gross output, employment, value added, capital investment and tax payments of the World's Largest Industry.

Sponsored by American Express Travel Related Services Company, Inc. Research by The WEFA Group.

Introducción

Este es el segundo informe anual de WTTC sobre la contribución de viajes y turismo a la economía mundial, y a las economías regionales y nacionales. Muestra el producto bruto, la creación de empleos, el valor agregado, la inversión de capital y los pagos impositivos de la industria más grande del mundo.

Patrocinado por American Express Travel Related Services Company, Inc. Investigación por The WEFA Group.

Einführung


ECONOMIC POWERHOUSE

Un Generator Económico

Viajes y turismo es:

- La industria más grande del mundo, con más de $3.5 miles de billones de producto bruto.
- El empleador más grande del mundo, con 127 millones de empleos, es decir, 1 de cada 75 trabajadores.
- El principal contribuyente industrial, produciendo el 6.1% del PNB mundial.
- El inversor de capital más significativo, superando los $422 billones.
- El principal productor de reclamaciones impositivas en la suma de $303 billones.

Géant économique

L'industrie des voyages et du tourisme représente:

- la plus grande industrie mondiale avec un chiffre d'affaires se rapprochant des US$ 3.500 milliards.
- l'employeur numéro 1 mondial fournissant du travail à 127 millions de travailleurs, soit une personne sur 15.
- le principal contributaire industriel produisant 6,1% du produit brut mondial.
- le plus important investisseur de capitaux avec plus de US$ 422 milliards.
- le contribuable majeur avec une charge fiscale de US$ 303 milliards.

Wirtschaftsmacht

Die Reise- und Tourismus-industrie ist:

- der größte Industrie-weig der Welt mit einem Gesamtertrag von über $3,5 Billionen US $.
- der größte Arbeitgeber der Welt mit 127 Millionen Arbeitsplätzen, d.h. jeder 15. Arbeitnehmer ist in dieser Branche tätig.
- mit 6,1% führend am weltweiten Bruttosozialprodukt beteiligt.
- mit über 422 Milliarden US $ der ehrgeizigste Investor.
- mit 303 Milliarden US $ der größte Steuerzahler.

經濟の確かな源として

旅行産業は、

- 総産出高3.5兆ドルを誇る世界最大の産業である。
- 世界最大の雇用主、1億2700万の就業者をかかえ、15人に1人は旅行産業に従事している。
- 世界のG N Pの6.1%を創出す、世界経済の要請産業である。
- 資本投下額は4220億ドルを超え、投資に最も積極的な産業である。
- 税払いは3030億ドルにのぼる、第一級の納税者である。
Creating Wealth

Travel & Tourism’s gross output increased to US$2.9 trillion in 1990. That’s 12.3% of consumer spending. After considering the devastating effects of the Gulf War and economic recession, 1993 expectations are for modest renewed growth, with Travel & Tourism growing more than 6.1% per year, or 23% faster than the world economy.

The EC leads the world in gross output, while the Caribbean leads in Travel & Tourism growth.

Wohlstand

1990 stieg der Gesamtertrag der Reise- und Tourismusindustrie auf 2,9 Billionen US $ an. Das sind 17.3% der Verbraucher- ausgaben.

In Anbetracht der verheerenden Auswirkungen des Golfkrieges und der Wirtschaftsrecession wird für 1993 nur ein bescheidenes Wachstum erwartet, wobei die Reise- und Tourismusindustrie mit einer jährlichen Zunahme von über 6.1% oder 23% rascher als die Weltwirtschaft wächst.

Westeuropa ist weltweit führend in Bezug auf den Gesamtertrag und die Karibik im Wachstum der Reise- und Tourismusindustrie.

Wirtschaft de richesses


Tenant compte des conséquences désastreuses de la guerre du Golfe ainsi que de la récession économique, les perspectives pour 1993 indiquent un renouveau modéré avec une croissance annuelle de plus de 6,1% pour l’industrie des voyages et du tourisme, soit 23% de plus que l’économie mondiale.

La CE produit le plus important chiffre d’affaires mondial tandis que les Caraïbes méritent quant à eux la croissance de l’industrie des voyages et du tourisme.

Kriecher de

Riqueza

El producto bruto de viajes y turismo alcanzó los US$2.900 millones en 1990, lo que equivalió al 12,3% de los gastos de los consumidores.

Teniendo en cuenta las consecuencias devastadoras de la guerra del Golfo así como la recesión económica, las expectativas para 1993 indican un modesto crecimiento con una tasa anual de más de 6,1% para el sector del turismo y del viaje, que es 23% más que la economía mundial.

La CE lidera el mundo en producto bruto de viajes y turismo mientras que el Caribe lidera el crecimiento de la industria del viaje y del turismo.

Wohlstand

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TRAVEL & TOURISM GROSS OUTPUT
ANNUALIZED GROWTH RATES 1987 - 1990
(Percent)

<table>
<thead>
<tr>
<th>Region</th>
<th>Travel &amp; Tourism</th>
<th>All Industries</th>
</tr>
</thead>
<tbody>
<tr>
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<td>14.8</td>
<td>8.8</td>
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<tr>
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<td>Caribbean</td>
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<td>Asia &amp; Pacific</td>
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<td>9.6</td>
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<tr>
<td>Western Europe</td>
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<td>Eastern Europe</td>
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<td>1.5</td>
</tr>
<tr>
<td>Middle East</td>
<td>8.7</td>
<td>47.3</td>
</tr>
</tbody>
</table>

TRAVEL & TOURISM 1990 GROSS OUTPUT
($ Billions U.S.)

TRAVEL & TOURISM GROSS OUTPUT
($ Billions U.S.)
Creating Jobs

Travel & Tourism created 5.7 million jobs in 1990, to total 6.5% of the global workforce, or 1 in every 15 employees.

By country, Travel & Tourism has more employees than most other industries.

Between 1990 and 1993, Travel & Tourism employment is expected to grow 50% faster than world employment.

By 1993, Travel & Tourism workers will earn $869 billion, or 5.7% of the world compensation total.

Arbeitsplätze

1990 hat die Reise- und Tourismusindustrie 5.7 Millionen Stellen geschaffen, das 6.5% aller Arbeitsplätze der Welt, d.h. 1 von 15 Beschäftigten.

Pro Land sind mehr Arbeiter in der Reise- und Tourismusindustrie beschäftigt als in jedem anderen Industriezweig.

Es wird erwartet, daß zwischen 1990 und 1993 die Anzahl der Arbeitsplätze in der Reise- und Tourismusindustrie um 50% rascher als die der weltweiten Arbeitsplätze wächst.

1993 werden die Beschäftigten in der Reise- und Tourismusindustrie 869 Milliarden US$ oder 5.7% des Gesamtinkommens der Welt verdienen.
Adding Value

Travel & Tourism produced $1.449 trillion of value added, or 5.9% of world GNP in 1990.

Since 1987, the industry's contribution to world GNP has increased steadily, and it is expected to reach 6.1% by 1993.

By country and globally, Travel & Tourism's value added is significantly greater than other industries typically considered ahead of Travel & Tourism by public policy makers.
Invasive Capital

Travel & Tourism invested $351 billion of new capital in 1990, representing 6.7% of worldwide capital investment.

The industry's 1990 capital investment will support $276 billion new gross output and 11 million new jobs.

The Caribbean shows the highest capital investment growth at nearly 70%.

Eastern Europe will need three times historical capital investment to match OECD standards.

Investissement de capitaux

En 1990, l'industrie des voyages et du tourisme a investi US$ 351 milliards de capital frais, soit 6.7% des investissements de capitaux mondiaux.

En 1990, le résultat de l'investissement en capitaux de l'industrie sera une augmentation du chiffre d'affaires de US$ 276 milliards ainsi que la création de 11 millions d'emplois nouveaux.

Les Caraïbes effectuent des accroissements d'investissements de capitaux les plus élevés à près de 70%.

Pour égaler les normes de l'OCDE, l'Europe de l'Est devra consentir à des investissements de capitaux trois fois plus importants que par le passé.

Kapitalinvestitionen

Die Reise- und Tourismus-industrie hat 1990 351 Milliarden US$ neues Kapital investiert, was 6.7% der weltweiten Kapitalinvestitionen ausmacht.


Die Karibik weist mit nahezu 70% das größte Wachstum der Kapitalinvestitionen auf.

Osteuropa wird das Dreifache der vergangenen Kapitalinvestitionen tätigen müssen, um den OECD-Standard zu erreichen.

Investirznie de Capital

En 1990 se invirtieron $351 billones de capital nuevo en viajes y turismo, lo que representó el 6.7% de las inversiones mundiales de capital.

Las inversiones de capital de la industria efectuadas en 1990 sustentarán un nuevo producto bruto de $276 billones y de 11 millones de empleos nuevos.

Asia y la región del Caribe mostraron el más alto crecimiento de inversiones de capital, cerca del 70%.

Europa oriental necesitará una inversión de capital equivalente al triple de su inversión histórica para igualar las pautas de la OCDE.

Inversion de Capital

Investissements de capitaux

Kapitalinvestitionen

Kapitalinvestitionen

Osteuropa wird das Dreifache der vergangenen Kapitalinvestitionen tätigen müssen, um den OECD-Standard zu erreichen.

Investissement de capitaux

Kapitalinvestitionen

Osteuropa wird das Dreifache der vergangenen Kapitalinvestitionen tätigen müssen, um den OECD-Standard zu erreichen.
### Annualized Growth Rates 1987 - 1990

<table>
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<th></th>
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</thead>
<tbody>
<tr>
<td>World</td>
<td>8.4</td>
<td>7.6</td>
<td>6.6</td>
<td>6.7</td>
</tr>
<tr>
<td>Africa</td>
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<td>11.8</td>
<td>11.8</td>
<td>11.6</td>
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<tr>
<td>North America</td>
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<td>11.8</td>
<td>11.8</td>
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</tr>
<tr>
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<td>17.8</td>
<td>18.1</td>
<td>18.1</td>
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<tr>
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<td>7.66</td>
<td>7.66</td>
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<tr>
<td>Asia &amp; Pacific</td>
<td>19.1</td>
<td>12.6</td>
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<tr>
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<td>1.8</td>
</tr>
<tr>
<td>Middle East</td>
<td>32.6</td>
<td>8.7</td>
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### Travel & Tourism 1990 Capital Investment

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<tr>
<th>Region</th>
<th>Capital Investment (Percent of All Industries)</th>
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<tr>
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<td>6.1</td>
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<tr>
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<tr>
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<td>Latin America</td>
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<tr>
<td>Caribbean</td>
<td>22.0</td>
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<tr>
<td>Australia, Japan, New Zealand</td>
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</tr>
<tr>
<td>Southeast Asia &amp; Oceania</td>
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</tr>
<tr>
<td>Other Pacific</td>
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<tr>
<td>European Community</td>
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<tr>
<td>Other Western Europe</td>
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<td>7.7</td>
</tr>
<tr>
<td>Middle East</td>
<td>2.6</td>
</tr>
</tbody>
</table>

### Travel & Tourism Capital Structure

- **1987**
  - Capital Base: $2.871 Billion
  - New Investment: $2.97 Billion
  - New Sales: $3.66 Billion
  - New Taxes: $4.1 Billion
  - New Jobs: 11 Million

- **1989**
  - Capital Base: $3.26 Billion
  - New Investment: $4.1 Billion
  - New Sales: $4.95 Billion
  - New Taxes: $4.1 Billion
  - New Jobs: 11 Million

- **1990E**
  - Capital Base: $3.56 Billion
  - New Investment: $4.1 Billion
  - New Sales: $4.95 Billion
  - New Taxes: $4.1 Billion
  - New Jobs: 11 Million

- **1996**
  - Capital Base: $4.1 Billion
  - New Investment: $4.1 Billion
  - New Sales: $4.95 Billion
  - New Taxes: $4.1 Billion
  - New Jobs: 11 Million

- **1999**
  - Capital Base: $4.1 Billion
  - New Investment: $4.1 Billion
  - New Sales: $4.95 Billion
  - New Taxes: $4.1 Billion
  - New Jobs: 11 Million
GENERATING TAXES

Travel & Tourism generated $251 billion or nearly 5.6% of all direct and indirect corporate taxes in 1990 plus $182 billion in personal income taxes from its 118 million employees.

By 1993, Travel & Tourism's corporate, personal and other taxes are expected to total $520 billion. This cost element is increasing faster than all others.

---

Generación de Impuestos

Viajes y turismo generó $251 billones, casi el 5.6% de todos los impuestos empresariales, directos e indirectos, en 1990; sin contar los $182 billones en impuestos a los ingresos personales provenientes de los 118 millones de empleados de esta industria.

Para 1993, se prevé que los impuestos empresariales, personales y de otras fuentes relacionadas con viajes y turismo ascenderán a un total de $520 billones.

Este elemento de costo está aumentando más rápido que todos los otros.

---

Générateur d'impôts

En 1990, l'industrie des voyages et du tourisme a généré un chiffre de US$ 251 milliards, soit 5.6% de tous les impôts directs ou indirects de sociétés ainsi que US$ 182 milliards d'impôts sur le revenu versés par 118 millions d'employés.

D'ici 1993, il est anticipé que les différents impôts versés par l'industrie, qu'ils soient de sociétés, personnels ou autres, seront de l'ordre de US$ 520 milliards.

Ce poste de frais connaît une croissance plus rapide que tout autre.

---

Steuereinnahmen


Dieses Kostenelement steigt rascher an als alle anderen.
The Multiplier Effect

Travel and Tourism's direct contribution is $2.9 trillion in gross output and 118 million jobs, and its purchases of goods and services totalled $1.5 trillion in 1990, initiating an indirect effect of $7.3 trillion in GNP and 295 million jobs.

The Multiplier Effect

El Efecto Multiplicador

El aporte directo de viajes y turismo ($2.9 miles de billones de producto bruto y 118 millones de empleos) alimenta una reacción económica en cadena que comienza con las compras realizadas a otras industrias y el gasto de utilidades, dividendos y remuneraciones de empleados.

Las compras de bienes y servicios relacionados con las actividades de viajes y turismo ascendieron a un total de $1.5 miles de billones en 1990, iniciando un efecto indirecto de $7.3 miles de billones de PNB y 295 millones de empleos.

Multiplikatoreffekt

Der direkte Beitrag der Reise- und Tourismusindustrie ($2.9 Billionen US $) beträgt $2.9 Billionen US $, die Einkäufe an Waren und Dienstleistungen beliefen sich auf $1.5 Billionen US $.


El Efecto Multiplicador

Les contributions directes de l'industrie des voyages et du tourisme (chiffre d'affaires de US $ 2,900 milliards et 118 millions d'emplois) alimentent une réaction en chaîne économique qui débute avec des commandes placées auprès d'autres industries et dans laquelle sont incluses la dépense des bénéfices, des dividendes et la rémunération des employés.

En 1990, les achats de biens et de services s'élevaient à US $ 1,500 milliards, ayant ainsi un effet indirect sur un produit brut mondial de US $ 7,300 milliards et 295 millions d'emplois.

Multiplikatoreffekt

Der direkte Beitrag der Reise- und Tourismusindustrie (2,9 Billionen US $) beträgt 2,9 Billionen US $, die Einkäufe an Waren und Dienstleistungen beliefen sich auf 1,5 Billionen US $.


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### Travel & Tourism Multiplier Effect

<table>
<thead>
<tr>
<th>Gross Output</th>
<th>Direct</th>
<th>Industry/Induced</th>
<th>Multiplier</th>
<th>Total Impact</th>
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<td><strong>250%</strong></td>
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<table>
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<th>Employment</th>
<th>Direct</th>
<th>Industry/Induced</th>
<th>Multiplier</th>
<th>Total Impact</th>
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<tr>
<td></td>
<td></td>
<td></td>
<td><strong>250%</strong></td>
<td></td>
</tr>
</tbody>
</table>

### Travel & Tourism 1990 Employment (Millions of Employees)

- Direct: 18
- Indirect & Induced: 25
- Total Impact: 43

### Travel & Tourism 1990 Gross Output ($Billion U.S.)

- Direct: 2.501
- Indirect & Induced: 1.253
- Total Impact: 10.154
<table>
<thead>
<tr>
<th>Region</th>
<th>Gross Output</th>
<th>Employment</th>
<th>Value Added</th>
<th>Capital Investment</th>
<th>Indirect Taxes</th>
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<tr>
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<td>Asia &amp; Pacific</td>
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Attention: The Singapore Copyright Act applies to the use of this document.
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Results for Greece, Portugal, and Turkey not available.
Perceptions of Economic Contribution

For the second year, WTTC commissioned a survey of 400 policy and opinion makers in 20 countries about the economic contribution of different industries. The results suggest travel & tourism is perceived to be the 8th largest contributor globally, 6th in Western Europe, 7th in Eastern Europe, 8th in Middle East/Africa, 6th in North America, and 4th in South America. This is a general improvement over last year's results, but still contrasts sharply with its actual contribution as the World's Largest Industry.

Perception del Aporte Economico
Para el segundo año, WTTC encargó una encuesta de 400 individuos responsables de formular políticas y de determinar la opinión pública en 20 países, acerca del aporte económico de las diferentes industrias. Los resultados sugieren que viajes y turismo se perciben como el 8° aporte más grande a nivel mundial, el 6° en Europa Occidental, 7° en el Norteamérica, 8° en el Medio Oriente/Africa, 6° en América del Norte y 4° en Sudamérica. Esos son mejora general sobre los resultados del año pasado, pero contrastan notablemente con su contribución real como la industria más grande del mundo.

Perception de l'apport économique
Pour la deuxième année consécutive, WTTC a commandé un sondage d'opinion de 400 personnes faisant autorité dans 20 pays différents concernant l'apport économique de diverses industries. Le résultat indique que l'industrie des voyages et du tourisme est perçue comme se trouvant en 8e position globalement, 6e en Europe Occidentale, 7e en Europe de l'Est, 13e en Amérique du Nord, 6e en Asie/Pacifique et 4e en Amérique du Sud. Comparés à ceux de l'année dernière, ces chiffres représentent une amélioration générale mais, toutefois, encore toujours en contradiction flagrante quant à leur apport reel, le plus important, à l'économie mondiale.

Eindruck des Wirtschaftsbeitrages

経済への貢献の認識
第2年度に、WTTCは、世界20の国、400人の政策担当者、オピニオンリーダーを対象に、それぞれの業種がどのように経済に貢献しているかに関して調査を行った。調査結果では、旅行産業の経済への貢献度は、世界的にみれば第8位と考えられており、中東・アフリカでは第6位、西欧では第7位、東欧では第8位、北米では第13位、アジア・太平洋地域では第6位、南米では第4位と考えられていることが明らかになった。こうした結果は、過去数十年における世界的な産業の発展を反映するものだから、なお、世界最大の産業である旅行業の現実の貢献度とは著しい違いをなしてい
## PERCEPTIONS OF TRAVEL & TOURISM'S ECONOMIC CONTRIBUTION

*(RANKING FROM 15 INDUSTRIES)*

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<td>3. Engineering</td>
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<td>4. Agriculture</td>
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<td>5. Construction</td>
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<td>6. Automobiles</td>
<td>Czechoslovakia 8th</td>
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<td>7. Petrochem</td>
<td>Denmark 6th</td>
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<td>9. Banking/Insurance</td>
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<td>Kenya 10th</td>
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<td>South America</td>
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CONCLUSIONS

Travel & Tourism is the World’s Largest Industry making enormous contribution to the world, regional and national economies.

A contribution far greater than that of industries traditionally considered important.

If governments recognize this fact and adopt responsive policies to expand markets and eliminate barriers to growth, this contribution could increase substantially, creating wealth, creating jobs, and enhancing continued economic growth.

Conclusions

Viajes y turismo es la industria más grande del mundo, y aporta una enorme contribución a la economía mundial, y a las economías regionales y nacionales.

Es una contribución mucho más grande que la de las industrias que se han considerado tradicionalmente importantes.

Si los gobiernos reconocen este hecho y adoptan políticas sensibles para ampliar los mercados y eliminar barreras al crecimiento, esta contribución podría incrementarse considerablemente, creando empleos, creando riqueza, y enriqueciendo la economía continuamente.

Conclusions

L’industrie des voyages et du tourisme est la plus importante du monde et son apport aux économies mondiales, nationales et régionales est énorme.

Cet apport est, par ailleurs, bien plus considérable que celui des industries traditionnellement considérées comme importantes.

Si les gouvernements veulent admettre cette réalité et par conséquent, adopter des politiques ayant pour but de développer le marché et d’en faciliter la croissance, il est certain que la création d’emplois et tout ce qui s’ensuit contribuerait d’avantage encore à assurer le développement.

Schlussfolgerungen

Die Reise- und Tourismusindustrie ist die größte Industrie ihrer Welt und liefert einen enormen Beitrag zur Welt-, Regional- und Volkswirtschaft, der weit größer als der der traditionell wichtigen Industrien ist.

Wenn die Regierungen diese Tatsache erkennen und Maßnahmen zur Erweiterung der Märkte und Beseitigung der Wachstumsschranken ergreifen, könnte dieser Beitrag noch wesentlich größer werden und Wohlstand wie auch Arbeit geschaffen.

Conclusions

旅行と観光業は世界最大の産業であり、世界、地域、および国々の経済への貢献は、従来考えられていた他の産業よりも遥かに大きい。政府が、この事実を認識し、市場の拡大、成長の障害を除去するために必要な施策を講ずるなら、その経済への貢献はさらに確かなものとなり、より大きな発展と雇用の大幅な増大をもたらす。
Methodology


Data generated from national income and product account statistics (SNA) includes shares of transport • entertainment • restaurants and hotels • fuel • clothing and footwear • personal care • food, beverages and tobacco • direct visitor purchase • miscellaneous goods and services.

Complete methodology published in the WTTC Report - Unabridged.
March 31, 1992

The World Travel & Tourism Council’s (WTTC) Second Annual Report contains one simple, compelling message:

“Travel & Tourism is the World’s Largest Industry, and The World’s Largest Employer Creating Wealth, Creating Jobs.”

The report shows that despite current economic challenges, our industry is forecast to produce 6.1% of world GNP by 1993, employ 1 in every 15 workers, and generate 13% of consumer spending.

These figures are higher than agriculture, manufacturing, healthcare, finance, construction, or telecommunications. In fact, they are higher than any other industry.

Nonetheless, Travel & Tourism’s economic contribution is still not adequately understood. A poll taken by the WTTC in 20 countries around the world found that decision-and policy-makers rank Travel & Tourism as the 8th largest industry in terms of economic contribution. The WTTC Report corrects this misperception, and sends a potent message to governments grappling with sluggish growth and rising unemployment.

We are committed to working with policy-makers to:

• Expand travel markets in an environmentally compatible way;
• Eliminate barriers to free flow of tourists;
• Encourage investment in our business and minimize burdensome travel taxes on our customers; and
• Upgrade our infrastructure - roads, railways, airports and airways.

These are the issues at the top of the WTTC’s 1992 agenda.

We want to see them at the top of government agendas as well, so that the World’s Largest Industry can more effectively contribute to global economic revival and more readily serve its customers.

James D. Robinson III
Chairman & CEO, American Express Company
Chairman, World Travel & Tourism Council

Geoffrey H. Lipman
President, World Travel & Tourism Council
TOURISM TO THE YEAR 2000
QUALITATIVE ASPECTS AFFECTING GLOBAL GROWTH
(From a paper produced for the World Tourism Organisation in December 1990.)

This paper, authored by tourism consultant Robert Cleverdon of Cleverdon Steer Ltd, Richmond, UK, provides one of the best encapsulations seen by the author about the issues that the travel and tourism industry will face in the final decade of this century.

Travel journalists can use it as background material for story ideas. Travel communicators can use it to identify points they can build upon and highlight in their publicity, promotion and marketing material, both within the industry and beyond.

At one point, the paper is emphatic in its view that: No country can achieve a successful tourism sector without close communication and cooperation between the administrators/regulators and the operators - in most instances the public and private sectors.

That alone underscores the importance of this course and this manual.
EXOGENOUS VARIABLES AFFECTING TOURISM

The demand for tourism is determined both by market forces (i.e., the demand for, and supply and distribution of, tourism products and services) and by exogenous variables (i.e., factors not directly related to tourism but which influence the extent and form of demand for tourist activity).

Exogenous variables affecting tourism include demographic and social changes, economic and financial developments, political/legislative/regulatory changes, technological developments, transport infrastructure and the safety of travel.

DEMOGRAPHIC AND SOCIAL CHANGES

Changes in the demographic structure and social pattern of the populations of the developed and newly industrialised countries mean that, regardless of other factors, more people will have the time, inclination and income to travel. These changes include:

- the ageing of the population;
- increase in working women and two income earning households;
- growing proportion of single adults;
- trend towards later marriage and families;
* likely faster growth in the numbers of childless couples than in the overall population;

* relaxation of immigration restriction;

* increased paid leave and more flexible working time;

* earlier retirement; and

* increased awareness of travel possibilities.

Though global population growth rates are slowing, there are increasing numbers in the age groups with the greatest propensity and financial ability to travel. **One of the most marked changes in developed countries will be the continued decline of the numbers of people aged 15-24.** The post-war birth bulge is working itself through the age groups, a factor which combined with declining birth rates in the 1960s and 1970s and a greater life expectancy, is leading to the middle aged and elderly constituting a higher proportion of populations in the developed and newly industrialised nations.

**The forecast that age groups with among the greatest discretionary disposable income (i.e., the 35-54s) will show most growth augurs well for holiday travel, while the growth in the proportion of the population which is over 65 also promises well for holiday operators** since retirees are increasingly well off, reaping the benefit of inflation-protected state and corporate retirement schemes.
The importance of women in the workforce of all major tourist generating regions is rising. Women are marrying and having children later and returning to work after having children. Both as a market segment in their own right and by providing greater household funds for discretionary spending, women are a major force in leisure/holiday and business travel activity.

The two main changes in the nature and composition of the average household are the increased importance of single member and childless couples households, and two-income earning households. These family structure trends will continue, and provide growth in respect of the "single" and "empty nest" holiday market segments.

At current growth rates during the next 20 years, the workforce in Third World countries will expand by 700 million, at a time when the number of young workers in the industrialised countries will stagnate or decline. In consequence, there is envisaged a relaxation in immigration restrictions on the part of the industrialised countries to provide the human capital necessary to sustain economic growth.

The impact of these developments for travel and tourism will be:

* increased travel between the home countries and the foreign job locations of the migrant workers; and

* the emergence of travel and tourism products and services designed for specific ethnic groups (i.e., destinations, formats, themes).
More people have increasing volumes of leisure time and greater flexibility in utilising this time i.e.:

- paid leave entitlement is rising;
- job sharing and flexible working hours are becoming more common;
- retirement age is declining.

Longer paid leave entitlement will result in more frequent holidays; particularly those of short duration. More flexibility in working patterns will in turn lead to more variation in holiday travel demand, e.g., growing demand for different types of destinations and activities, more tourist business outside the conventional peak seasons. The present-day retiree is better educated, more affluent, in better health and more active than in any preceding period. There are strong grounds for looking to the retiree market to provide substantial growth in holidays of:

- long duration;
- long haul; and
- a variety of content and format.

Improved educational levels (and particularly higher education) are increasing different people's awareness and knowledge of each other. At the same time, communications technology now makes it possible for instant contact to be
made between almost all parts of the world - in many cases, a live, visual contact. The world is becoming increasingly cosmopolitan, with all its peoples influencing each other. There is emerging a global lifestyle. This globalisation process has many impacts on, and implications for, travel and tourism. The most fundamental of these is the fact that increased travel is both a reason for, and the result of, the global lifestyle.

The resultant growth in interest in other societies fuels the desire to travel and to seek varied experiences from such travel. Consumers are demanding new, more imaginative and varied tourism products and services. Tailor-made travel arrangements will grow at a faster pace than pre-packaged holidays over the next decade.

ECONOMIC AND FINANCIAL DEVELOPMENTS

There is a clear link between travel trends and general economic developments. Travel growth is generally very sensitive to whether an economy is expanding, or is in a recessionary phase. Typically, if other factors such as relative prices are unchanged, a 1% growth rate in total real private consumption tends to be associated with a standstill in travel, 2.5% with a 4% expansion in travel, and 5% growth in consumption with a 10% rate of increase in travel spending; at anything below 1% growth in consumption, travel usually falls, but responses for individual origin countries vary considerably from these averages.

The 1980s saw an average annual real rate of growth of Gross National Product (GNP)/Gross Domestic Product (GDP) in major industrialised countries of close to 3%. The consensus of international forecasting agencies is that economic
growth will continue at a moderately high rate during the 1990s, provided the uncertainties associated with the Gulf conflict are resolved without further, major escalation of events in the region. The World Bank has developed a number of alternative growth paths for the 1990s. One scenario - termed "adjustment with growth" - projects a 2.7% average annual GDP growth in the industrialised member countries of the Organisation for Economic Cooperation and Development (OECD) for the period 1989-1995. For low and middle income countries, the average annual rate of increase will be higher at 4.6%. Even the moderate levels of economic growth predicted in the 1990s will sustain a good rate of expansion in tourist activity and expenditure.

Throughout the past 40 years, increasing real wealth in the major industrialised countries has led to almost continuous growth in holiday taking. This long-term and deep-seated trend has led to the consumers of these countries increasingly regarding holidays as "necessity" rather than a "luxury".

Looking to the 1990s, Personal Discretionary Disposable Income (PDDI) is likely to continue to grow and, perhaps more significantly, to be spread more widely across income distribution bands. The consequences of these trends will be:

* Greater tourism activity and expenditure on the part of the expanding numbers of higher income consumers; and

* A larger proportion of society will gain the means to engage in travel and tourism.
The prices charged for travel and tourism products and services are determined not only by the levels of, and growth in, income available for travel and tourism purposes, but also by the factor costs of those products and services. **The second half the 20th century has been a period during which the costs of travel have consistently risen by less than inflation as a whole, reflecting increased economies of scale, technological advances and competitive pressures.** The removal of restrictive legislation on airline operations and the continuing development of larger and more fuel efficient aircraft will continue to be major influences on travel price trends.

Another key factor is the price of fuel oil, affecting as it does the transport component of any trip. The longer the trip, the more significant is the transport cost factor in the total trip cost and the greater is the influence of any variation in the price of oil. Prior to the August 1990 start of the Gulf crisis, a period of stable oil prices was anticipated leading to the conclusion that oil prices would not hinder, and may help accelerate, travel and tourism growth rates.

Changes in real exchange rates are the prime influence on the relative cost of travel abroad. This also has a very big effect on travel growth. Generally, a 5% rise in the relative cost of travel aboard typically results in a drop of between 6% and 10% in travel. The 1990s seem likely to continue the pattern of exchange rate movements between major countries - and these will influence tourist flows between the strong and weak currency countries.
POLITICAL, LEGISLATIVE AND REGULATORY CHANGES

Among the current and envisaged changes and developments which will influence the growth and pattern of tourism during the 1990s are:

* political changes in Eastern Europe;

* European Community (EC) measures, in respect of fiscal and regulatory harmonisation, and air travel liberalisation;

* frontier formalities for international travellers;

* economic development policies; and

* the environmental protection movement.

Assuming continued easing of travel restrictions into/out of Eastern Europe, the relatively small present volumes of tourism between the countries of Western and Eastern Europe will almost certainly lead to high proportionate increase in traffic between the regions.

The EC proposes to complete the full programme of Single Market measures by the end of 1992. As a result, aviation will become progressively less constrained by regulations and restrictive rules, and tour operators may expand across borders.
The combined impact of the various EC Initiatives (i.e., fiscal and regulatory harmonisation, tourism, promotion, air travel liberalisation) will undoubtedly be to increase air travel and tourism generally in Europe. However, the benefit of these measures may not be substantially realised in the short term; it may be the second half of the decade before essential air traffic control systems improvements come on stream. On top of the air traffic control issue, is the problem of congested airports. Without rapid comprehensive and coordinated action in both these areas, the EC's "open skies" of deregulation stands little chance of providing European passengers with lower fares and greater choice of flights enjoyed by American travellers.

Pressures for air deregulation are being exerted in other parts of the world, particularly in developing countries. The dilemma for developing countries is that it is difficult for their national carriers to raise the finance to acquire the latest generation aircraft, and to gain the reputation in tourist generating markets to attract custom. At the same time, adoption of an "open skies" policy is associated with the risk of forfeiting a large proportion of the tourist’s overall expenditure, in the cases where that tourist flies by a foreign carrier. This is a problem area which few developing country governments have resolved fully satisfactorily. The goal is a balance between protecting the national carrier and realising maximum economic benefits from the tourism sector. In their air transport policy deliberations, developing country governments should include consideration of the fact that, because all aircraft and parts are imported, the "leakage" factor in their airlines' international revenue is likely to be higher than for spending by tourists actually in the destination country.
International tourism has long been seen as a two-edged sword for developing countries. On the one hand, it yields valuable foreign currency and employment, while, on the other hand, it brings change to traditional social systems and areas of natural beauty, and creates a high degree of dependence.

The last decade has seen a change in the balance of this debate, away from perceiving tourism in "black and white" terms - whether it should, or should not, be encouraged. Instead, international tourism is now increasingly recognised as a modern economic development tool, associated with both benefits and problems. Nearly all developing countries understand that some international tourism is desirable. The approach of growing numbers of governments of such countries is to create the conditions for the development of the optimal scale and form of tourism, taking account of economic, social, cultural and environmental needs. This means comprehensive and integrated planning for the tourism sector.

The second half of the 1980s has witnessed the growth of the environmental awareness movement. The environment is tourism's base. Tourism, therefore, is central to the debate. It depends to a large extent on natural resources, both for passive tourism (i.e., sightseeing) and for participatory tourist activities (e.g., hiking/ trekking, water-based sports). At the same time, tourism requires infrastructural and facility development, and by definition involves people moving around -- both typically in areas of outstanding natural beauty.

There is growing realisation of the importance of the environment to tourism. The next decade will see greater attention paid, both by host country governments and by tourism developers and operators, to creating a
"sustainable tourism". Sustainable tourism development meets the needs of present tourist and host regions while protecting and enhancing opportunity for the future. It is envisaged as leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems.

Sustainable tourism can only take place if carrying capacity studies for key tourist sites are conducted, and then rigorously implemented through a system of effective planning and operating controls. These studies and regulations will constitute the cornerstones of long-term, local tourism management strategies and plans. Sustainable tourism cannot work, however, solely on the basis of being imposed by authorities; it also requires acceptance of the concept’s validity and cooperation in its implementation from the tourism private sector, as well as the participation of the local communities and the tourist themselves.

TECHNOLOGICAL DEVELOPMENTS

Advances in aeronautical engineering and electronic data systems technology will continue throughout the 1990s. These developments will make travel faster, more direct (on high volume routes) and less expensive (in real terms), while the means of obtaining information about, and making booking for, travel will be facilitated.

Boeing forecasts that the world’s passenger airline fleet will grow by nearly 5,000 to 12,434 by 2005. The features of this expanded commercial passenger fleet will be:
* The predominance of larger airplane deliveries;

* The more effective use of airplanes (i.e., higher load factors achieved).

One of the key factors behind the expansion of the use of electronics travel products and services is that these developments bring benefits to both travel suppliers/distributors and travellers (whether on business or pleasure trips). For the travel trade, computerisation of previously manual tasks has resulted in more efficient data handling and processing, reducing the requirement for staff and, hence lowering operating costs. These costs saving are passed on - in part at least - to the travelling consumer who also benefits from these more efficient systems by being able to obtain information on, and make reservations for, travel products and services more closely in line with the traveller's needs and/or wishes. Technology is assisting the travel trade to provide a more complete, or tailor-made and faster service. Travel suppliers will, therefore, be increasingly able to target their products and services directly at the corporate sector and may choose to reduce the role and importance of the travel agent in facilitating travel bookings.

The 1990s will be a period when:

* The international trading environment will become somewhat more liberalised. Trade rules for services (including tourism), are likely to be included for the first time in the General Agreement on Trade and Tariffs (GATT);
* International trade will continue to experience substantial growth, with more countries actively participating as both exporters and importers;

* The major corporations will expand their international networks of operations, both by establishing new overseas branches and through acquisition (particularly between the main industrialised nations of Europe, USA and Japan); and

* Product "globalisation", i.e., common products marketed throughout the world will spread.

TRANSPORT INFRASTRUCTURE

This scale of growth in tourism will place great pressure on the facilities and amenities required by tourists. The most pressing problems are likely to be experienced in the area of transport infrastructure, i.e., sports, road and rail networks. Furthermore, transport infrastructure constraints are widely predicted in all parts of the world.

Without a concerted, global approach to the resolution of existing and future air transport difficulties, there are real prospects that air travel and tourism growth will be held back in many parts of the world throughout the 1990s. Indeed, air transport congestion may well prove to be the single greatest impediment to the full realisation of tourism growth potential during the coming decade. The problems of providing more runway capacity will require massive new investments and the political will to overcome powerful opposition.
SAFETY OF TRAVEL

Unless travellers feel a certain degree of security in making a trip, they will not embark on the journey. This perception of personal safety varies from traveller to traveller but is broadly comprised of five elements:

1. Travel - technical maintenance and operating standards;

2. Destination - health issues; crime (directed towards tourism); political and social situation;

3. Travel and Destination - terrorism. As tourism increases, so travel security becomes more important and complex. It is clear that while all travel involves some risk, there are many ways in which the travel sector can help minimise the level of exposure of travellers to danger.

Much is being done already; but more information dissemination and safeguarding actions are necessary. Above all, it is essential for governments and travel operators to work in unison on all travel security matters. Some increase in travel costs may result from measures taken.

TOURISM DEMAND, SUPPLY AND DISTRIBUTION

The key developments and trends directly related to the demand for, and supply of tourism products and services, and in the ways in which these products and services are distributed to prospective consumers, include the following.
MARKET SEGMENTATION

Demand for discretionary tourism is likely to be most directly influenced during the 1990s by the combination of two factors:

* travel being placed higher in consumers' scale of preferences; and

* greater attention being paid to the individual in society.

There will be an increase in the conversion rate of desire to actuality during the 1990s. This will be manifested in two ways:

* growth in the proportion of holiday taking - particularly to foreign destinations - among the population; and

* growth in multiple holiday taking (through short break, second, third, fourth etc. holidays).

Furthermore, the two key trends (i.e., the increased desire to take holidays, and growing demand for bespoke products and services) will combine during the 1990s leading to increase demand for new, more imaginative and varied tourism products and services. **Tailor-made travel arrangements will grow at a faster pace than pre-packaged holidays over the next decade.**

At the same time, the tour operating sector in the major tourist generating countries, recognising the need for development and innovation of their traditional range of package tour types, are actively seeking to establish new
programmes (i.e., related to relatively underdeveloped tourist destinations, specific themes etc.).

These various supply-demand developments envisaged for the 1990s and beyond translate into what is normally termed as market segmentation, i.e., the process by which a travel vendor, whether an airline, hotel, or destination, identifies and attracts consumers who will be satisfied by the product or service the vendor offers.

The manifold changes and developments predicted in the demographics, economic performance, awareness, interests and values of society, allied to technological advances in computer reservation systems and transport, and to the globalisation of the travel trade, will together lead to an increase in market segmentation in travel and tourism in the 1990s - particularly related to demographics, lifestyles and interest groups.

Some of the key growth tourism market segment areas are foreseen as being:

* wider spread of destination types, in particular "new", long haul destinations;

* mature market holidays i.e., tailored in respect of both content and facilities available;

* adventure travel i.e., covering anything combining two or more of the elements of environment, outdoors, nature, fitness and excitement; and
short breaks i.e., designed either as a means of relaxation away from home/work pressures or (increasingly) related to a special interest/activity.

DESTINATION PRODUCT DEVELOPMENT

The supply side of the demand-supply equation is both reactive and proactive; host country authorities respond to the growing demand for non-mainstream tourist activities by disseminating information about such possibilities; while many countries actively encourage the development of facilities to cater for tourists seeking to pursue their special interests.

The broadening of tourist interest is leading to:

* more destinations, particularly developing country destinations, entering the discretionary tourist market;

* greater diversification of tourist development in established tourism destinations; and

* facility and amenity development in line with the market trends towards "individuality", activity-orientation and requirement for high safety standards.
TOURIST OPERATOR PRODUCT AND SERVICE DEVELOPMENT

The 1990s will witness a wide range of tourism product and service developments, in line with the increasing fragmentation of tourist market demand and operators' recognition of the varying needs of the different tourist market segments.

Leading international hotel consultants indicate that the world's total stock of hotel rooms could grow from the present level of 10.5 million to 18.4 million by 2000. **The world's hotels are increasingly addressing more specific sectors of the market; hotel product segmentation will assume greater significance in the future development of hotel companies.** It is an effective method for hotel companies to maintain or expand market share and, in some instances, create new markets.

Overall, the pace of product segmentation will accelerate over the next 10 to 15 years, with the most rapid growth likely to occur at the top and bottom of the hotel sector - in luxury hotels (including those developing all suites facilities) and in the economy range where minimum levels of service are offered and which should, therefore, be cheaper.

New leisure market orientated developments are resulting from the developer's strategy of pursuing product segmentation coupled with the market demanding more activities and facilities at their chosen hotel/resort. Resorts based on broad themes and offering a range of features and pastimes related to the theme chosen are seen as a growing trend.
The next decades are likely to witness a more-than-proportionate increase in tourism of unconventional types to developing countries and in previously underdeveloped, frequently rural, locations. **While such development poses challenges in the sense of needing to safeguard the environment and the peoples of these areas, it also represents an opportunity to develop accommodation and other facilities which are in keeping with their setting, e.g., through the use of indigenous building materials and local construction personnel familiar with working with such materials, and the incorporation in the design of the buildings features, motifs, furniture, furnishings and artifacts all drawn from the locality/region.**

This serves both to maximise the economic benefit to be gained by the host population from the development, and to provide what tourists increasingly expect and want when they partake of a non-mainstream holiday. Tourist accommodation presented in the local style heightens the tourist’s feeling of authentic experience.

The most significant recent - and continuing - trend is the growth of self-catering accommodation. The cost of recruiting, training and maintaining the staff for a conventional hotel is extremely high - so high that it can be justified only at the luxury end of the tourist accommodation which is growing in significance is the ownership of second/holiday homes, purchase outright or via timeshare.

**The homogenous group package tour developed so extensively during the 1960s, 1970s and into the 1980s, in the major tourist generating countries (particularly in Western Europe and Japan) has become outmoded.** It is not in
line with the trend towards individual expression. This is not to say that the inclusive tour (IT) market is likely to suffer major and long term decline during the 1990s. Like other parts of the travel and tourism trades, tour operators will adjust to the changing patterns of consumer demand for leisure travel by developing a wider range of products tailored to different market segments.

The tour operator will utilise his negotiating power and skills in combining holiday components to develop a range of different IT products which share at least some common features (i.e., flight, hotel). In that way the increasingly independently-minded holiday-maker will find a holiday among the expanded range offered which is in line with his/her individual needs and which, at the same time, is cheaper and involves less difficulty in organising than a comparable holiday arranged independently.

Tourist attraction developments during the 1990s will be two (often combined) types, i.e., theme- based, activity-orientated.

Airlines are gaining a growing understanding of their passenger markets, utilising booking and traveller characteristic and preference information obtained from the computerised reservations systems. Airlines increasingly target customer groups with a product differentiated according to ground (i.e. dedicated check in, reserved lounge) and in-flight (i.e. size and comfort of seat, quality of food, beverage and entertainment) service, related to ticket price. Indeed, the speed and other capabilities of computer reservations systems will enable airlines to individually price each seat on their planes related to the known size and preferences of their traveller markets. The key is yield improvement.
There is a trend in tourism operators' strategies towards being customer-driven. Providing personalised service is seen by most types of travel and tourism operator as the key to obtaining, and retaining, custom. For example, it is no longer sufficient for an agency to offer a reservations and ticketing service. The modern travel agent offers a service which can include destination information, visa and passport service, low fares search and ticket delivery.

MARKETING

The pressures on destination and operator marketing strategies and programmes are twofold:

* intensifying competition, at all levels;

* tourists becoming both more demanding and more knowledgeable.

Not only will destinations and operators need to develop products and services in tune with consumer demand trends, their success will depend on marketing these more extensively, and in many instances on a more precisely targeted basis and more aggressively than has been the case in the past.

In consequence, marketing and promotional budgets will increase more than proportionate to tourism growth during the 1990s. At the same time, a higher premium will be attached to professional tourism marketing expertise.
HUMAN RESOURCE DEVELOPMENTS

The capacity of educational institutions in most countries to train staff at all levels, and for all the wide range of skills required, for the travel and tourism sector has rarely been adequate. There is danger that this problem will worsen during the 1990s -- in the industrialised countries because of the declining numbers of school leavers, and in the developing countries because of the anticipated strong growth of tourism and, hence, need for increased volume of tourism sector personnel.

Increased pressures on the output and content of tourism education and training programmes can be anticipated during the 1990s -- at all levels, in all categories, and in every type of tourist receiving country. Human resources could emerge as the single most important issue facing tourism operators into the next century.

COMPUTER RESERVATIONS AND GLOBAL DISTRIBUTION SYSTEMS

Computer reservations systems (CRSs) developed by the airlines have played significant role in facilitating increasing volumes of travel over the past two decades. There is now occurring a dramatic shift towards global travel distribution systems and increased competition amongst airline groups seeking to broaden and strengthen their product distribution through developing regional/global CRSs.

A major influence on the development of global CRS capabilities and choice of systems are anticipated changes in the pattern and requirements of the global
travel market. In the corporate travel sector, corporations are moving away from international and multi-national operations towards global operations and hence the requirement for travel booking and reservations systems on a global basis. **The leisure travel sector is also subject to change, with a growth in long haul travel, a marked trend away from package tour products in favour of independent travel arrangements, and a travelling public which is more demanding and more affluent.**

In consequence of these demand trends, there will be an increasing requirement for computer reservations systems to offer more travel information, faster processing time and more comprehensive booking and reservations functions (front end) as well as providing enhanced management accounting information including yield management programmes (back office).

The regional, airline-owned computer reservations system are forging global alliances and evolving into highly functional, increasingly user friendly, global distribution systems (GDS). The evolution from CRS to GDS has occurred in five distinct stages, from CRS as airline productivity tools, into electronic product distribution and sources of competitive advantage, to business in their own right and finally, into emerging global distribution systems.

* Airline vendor CRSs offer the travel booking and information collection and dissemination capabilities necessary to cope with the forecast growth in tourist movements. Nevertheless, there are threats and opportunities to take account of.
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<thead>
<tr>
<th>OPPORTUNITIES</th>
<th>THREATS</th>
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<tr>
<td><strong>Travel Suppliers</strong></td>
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<tr>
<td>Product distribution in global markets at competitive price levels; strategic links with other suppliers can be re-enforced through the CRS (i.e. through code sharing, connecting flights etc); Yield management programmes enable airlines to carefully monitor and match supply: demand</td>
<td>CRS effectively reduces the scope of airlines to personalise their product and weaken their own product marketing initiatives. Control of the product is in the hands of the CRS vendor not the airline. Large airlines/groups of airlines are likely to threaten small/medium sized airlines.</td>
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<tr>
<td>Airlines are in a position to price their seats precisely to what the market will bear. In practice this means an increase in the number/type of fares targeted at market segments.</td>
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<td><strong>Travel Agents</strong></td>
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<tr>
<td>Improved travel booking capabilities</td>
<td>Expensive to purchase and operate systems</td>
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<td>Improved travel management reporting</td>
<td>Training requirement</td>
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<tr>
<td>Faster systems and one-stop shopping approach</td>
<td>Agents need to select best system for their needs</td>
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<td>Enhanced range of products to sell</td>
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<td>Interactive keyboard system permits non-travel booking functions such as word processing, etc.</td>
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<td><strong>Consumers</strong></td>
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<tr>
<td>More efficient travel booking services</td>
<td>CRS system mergers could lead to control over pricing being held by a small number of travel service suppliers, resulting in a lack of competition and higher price levels.</td>
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<td>More travel information available</td>
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<td>Greater opportunities to identify lower cost travel arrangements</td>
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STRUCTURE AND PROSPECTS OF THE TRAVEL TRADE

The 1990s will be a period during which further concentration of power will occur in the travel and tourism trades. This will be manifested through:

* horizontal integration (i.e., larger operators acquiring or forming trading partnerships with mid-scale and smaller operators, or forcing them out of business through economies of scale);

* vertical integration (i.e., achieved through acquisition or, more commonly, strategic trading alliances, often via a CRS).

* global tourism business (i.e., operators expanding their activities to more countries, either by establishing their own branches, or by forging links -- or acquiring -- local firms.

The consequences of these developments is the emergence of an industry which comprises two broad types of operator:

* a small number of major, global operators;

* a considerable number of relatively small-scale, "niche players", catering for specialist market segments (typically as single country operations).
The mid-scale and small non-specialist tourism operator will be increasingly "squeezed", whether that operator is an airline, a hotel group, a travel agency chain, or a tour operator. The tourism business will be increasingly dominated by:

* effective product distribution (i.e., both availability - in other words access via CRS - and price competitiveness);

* professional marketing (with particular emphasis on product-market segmentation);

* trained, skilled personnel.

The fear of consumer travel groups is that if the number of airline or hotel choices (in terms of ownership or partnership) is reduced, then prices will rise and service deteriorate. Similarly, the operating link between an airline and a car rental company is perceived by many travellers as making them virtually a captive market once the initial airline choice is made.

DEVELOPMENT STRATEGIES

IMPACTS

The impacts of tourism on any receiving area (i.e., country, region or resort) are of three broad types: economic, socio-cultural, and environmental. The extent of these impact will increase during the 1990s because even at the low range forecast, there will be 188 million more international tourist arrivals in 2000
than in 1989, a rise of over 46%. Furthermore, the developing countries -- on which these impacts (particularly economic and socio-cultural) are most marked -- will increase their share of international tourism in the coming decade i.e., from close to 22% of arrivals in 1989 to around 30% by the end of the century.

International tourism will become a more important part of the world economy as tourism grows more rapidly than other areas of the economy. This will result in: a larger portion of jobs and income deriving directly from international tourism; and more local economies will be heavily supported by (and, as such, dependent on international tourism.

Tourism by its nature, involves contact between residents and visitors (i.e., hosts and guests) and this contact can create considerable socio-cultural impacts. Assessment of the impact that tourism will have on the lifestyle and culture of a local community depends both on the nature, scale and concentration of tourism proposed, and the specific socio-cultural characteristics of the local community in question, and the robustness of these features. There are few hard and fast rules; each case requires individual consideration involving investigation of the socio-cultural impacts leading to programmes designed and implemented to help tourism activity’s absorption within host countries’ societies, so as to cause minimum disruption to the community or the culture.

Environmental impacts grow in line with increases in tourist numbers. The problem of "crowding" in tourist areas will become more acute, especially in areas which are limited spatially or in their ability to absorb large numbers of
people. Fragile natural environments can be damaged by excessive flows of tourists. Museums and public building can quickly become overcrowded. There will be a greater need to plan for tourist growth to ease crowding and prevent damage to the natural environment.

One key issue when combines all these types of impact and which will assume increasing prominence in the next decade is the absorptive capacity of an economy with respect to tourism. This relates not just to the physical capacity of a particular natural or man-made feature (i.e., tourist flow) but in the wider sense of questioning the ability of an area to supply enough tourist infrastructure and facilities to handle the demand of tourists. **There can be limitations because of labour shortage, capital shortages, land shortages or natural scarcity.** There may also be alternative uses of resources which the local population finds preferable to setting them aside for tourism.

In addition, in respect of tourism development it is valuable to include clear guidance for the planning authorities on the type of building permitted i.e., building standards. These can encourage the use of the traditional designs as well as regulate the height, size, location, set back (e.g., from beach), density and features of tourist facility buildings.

More tourist destinations, sites and facilities are having to face up to the problems of weight of tourist visitor numbers. There are a number of tasks to be addressed in dealing with this issue:

* calculation of the carrying capacity, related to various criteria (principally economic, socio-cultural and environmental):
establishing tourist flows no higher than the maximum threshold;

* ensuring proper economic return on the investment required to serve the (imposed ceiling) tourist flow.

Various control mechanisms are being used, including:

* frontier entry;

* frontier currency controls;

* pre-charged minimum expenditure levels;

* pricing measures (e.g., road pricing);

* ticket sale admission.

As tourism expands rapidly, so the problem intensifies of ensuring that the quality of the tourism experience is of a sufficiently high level to produce visitor satisfaction. "Matching" the supply of tourist facilities and the tourism labour force with demand is a key component of planning for tourism. **Ensuring that the calibre of the facilities developed and the personnel employed in the tourism sector is adequately high, can be achieved in part by regulation, and partly through voluntary codes of conduct.**

Reference is already made to building standards. Equally important are minimum operation and personnel service standards. More universal adoption of licensing
and trade certification would reset in an improvement, and more consistent standard, of hotel etc operations around the world.

Of almost equal importance to the accommodation sub-sector are tourist operations patronised by most tourists in one form or another, e.g., guided tours (and, where relevant, treks/hikes), transport rental (i.e., cars, motorcycles, bicycles). Minimum standards for equipment (based on inspection) and minimum qualifications for personnel are needed. For example, tour guides should satisfy minimum standards related to product knowledge, communications skills and, in respect of activities like trekking: "first aid" medical knowledge.

**No country can achieve a successful tourism sector without close communication and cooperation between the administrators/regulators and the operators - in most instances the public and private sectors. Cooperation has to flow through every aspect of tourism -- policy planning, development, marketing and operation -- because in each instance the public and private sectors are interdependent. Neither will fully achieve its objectives unless these objectives are shared.**

Two of Government's primary roles in tourism are as catalyst and facilitator for tourism -- creating the conditions conducive to successful operation of the tourism sector. **Part of this catalytic and facilitating role is that of providing positive (but accurate) information about the country (or area) to both the consumers and the travel trades of major tourist source markets, and thereby generating and interest on the part of the residents of these countries to visit the country (or area).**
The principal responsibility for destination marketing lies with the public sector - normally through the national tourist authority and, often the national carrier - whereas the individual tourist operators are responsible for marketing and promotion activities to attract customers to their aircraft, hotels, tours, rental vehicles, restaurants etc. Really, however, these are two interlinked components of a single activity - the country’s tourism sector marketing. **Public-private sector collaboration is, thus, vital to the cost-effectiveness of tourism marketing.**

**REGIONAL COOPERATION**

Tourism is a sector of international trade which is well-suited to collaboration between countries because increasingly every country in the world is participating in travel and tourism both as generators and destinations. Collaboration can cover many areas -- both administrative and technical, and both directly and indirectly related to tourism. In this latter category, for example, aviation policy and airline operations need to be fully coordinated between the countries in given geographical and/or political regional groupings.

Two aspects of regional cooperation are of particular relevance for the 1990s:

* common standards (e.g., building standards, technical standards, tourist arrival forms and statistical recording and analysis);

* promotion.
CONCLUSION

The tourism sector is entering an age of:

* constantly increasing travel and tourism movements and expenditure;

* more competition among destination regions/countries;

* more awareness of, and attention paid to, the growing impacts of tourism economic, socio-cultural and environmental;

* a consumer who is both more knowledgeable about tourism destinations and travel options, and more demanding about the travel and tourism products/services chosen;

* a technology-driven marketplace, particularly in respect of computerised information and reservations system;

The factors combine to produce one conclusion: **To succeed in tourism in the 1990s a fully professional approach will be essential (on the part of both destinations and the travel trades).**

Success in this context is interpreted as a scale and form of tourism which:

* is assimilable by the host country and its people (with minimal negative socio-cultural and environmental impacts);
provides significant contribution towards the economic development of the destination countries;

* enable the investors and operators in the travel and tourism trade to achieve a satisfactory return on their capital; and

* provides a wholly satisfactory experience for the tourist.

This ideal position will not be reached without considerable upgrading of knowledge and skills (both on the part of tourism's administrators and the tourism operators) and greater political will to work together. The vital areas for improvement and expansion will be:

* comprehensive and integrated tourism development planning, leading to full and clear development strategies (and the control and implementation instruments needed).

* public-private sector collaboration i.e., channels for consultation, and joint programmes of activities, between national tourist offices (and, where relevant, other government departments) and travel and tourism operators;

* regional cooperation, covering aspects as varied as common standards and regional promotion.