

Tourism 2020 Vision

Volume 1

Global Forecasts and Profiles of Market Segments

World Tourism Organization

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Tourism 2020 Vision
Volume 7: Global Forecasts and
Profiles of Market Segments

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Introduction

The *Tourism 2020 Vision* programme of research and forecasting represents a continuation of WTO's work in the area of tourism forecasts initiated in 1990 with the general objective:

- to identify the key trends in tourism supply and demand world-wide, by region; and
- to determine their impact on the various sectors of the tourism trade; together with
- the implications for policy making and relevant strategies.

The first two phases produced a series of forecasting reports for the six WTO regions and a global volume (*Global Tourism Forecasts to the Year 2000 and Beyond*). These studies constituted part of the WTO's commitment to assist Members in developing the sophisticated tourism forecasting capabilities which are essential to support Governments and National Tourism Administrations (NTAs) role in tourism marketing and promotion, development planning and provision of infrastructure and services. WTO has continued its assistance in this area through inter alia a series of technical seminars and its regular *Tourism Market Trends* publications.

The response from Members to the first series of forecasting reports was strongly positive with a request for more detailed information such as: region-region (even country-country) flows, profiles of major outbound travel markets (both established tourism sources, and emergent origins), assessment of prospects for groupings of countries smaller than, or which constitute 'natural' groupings not in line with, the six WTO regions. Concise 'fact files' of a number of market segments (such as those that are already substantive, and those which have rapid-growth prospects) should also be included.

Phase 3 - *Tourism 2020 Vision* - was designed to take account of these expressed needs. An extensive programme of research and analysis was undertaken over a two-year period. The research included a new survey of NTA members of WTO with responses received from 85 countries. A follow-up response was also sought from 15 Asian countries in January and September 1998 as a consequence of the financial problems in the region. A survey was also carried out among 50 tourism 'visionaries' (i.e. tourism and travel companies, and their suppliers, researchers/writers/ publishers/academics specialising in tourism, economic and political specialists).

The results of the Phase 3 programme of work were presented in the following series of draft reports:

1 Executive Summary

A document entitled 'Executive Summary' was distributed at the General Assembly in Istanbul in October 1997 which contained: global tourism prospects and determinants; regional forecasts; the results of the NTA survey; and the 'Megatrends' which will need to be exploited (or taken into account) for success in the period to 2020. An updated version of the Executive Summary, distributed at the Ministerial Conference on Oceans and New Tourism Destinations in Lisbon in June 1998, was expanded to include key developmental and marketing factors; while a second revision was published in December 1999 taking the September 1998 Asian NTA survey results into account.

2 Global and Regional Forecasts

The detailed report on which the Executive Summary and its subsequent revisions are based.

3 Profiles of Market Segments

This report contains a series of 'fact files' containing analysis of major and rapidly growing market segments/niches, presenting information on a comparable, action-oriented format for each subject segment on:

- Working definitions;
- Estimates of magnitude;
- Characteristics of demand and supply;
- Growth prospects; and
- Promotional guidelines for NTAs.

4 Six Regional Volumes

Examination of changes, performance and trends in the 1990s will preface detailed forecasts for each region, and special groupings of countries within these regions. Inbound and outbound tourism forecasts are presented, as well as principal origin-destination forecasts on a subregional and (in selected major cases) a country-country basis.

In the present volume the results of report 2 Global and Regional Forecasts and report 3 *Profiles of Market Segments* are integrated. It incorporates as well a final updated and revised version of the *Executive Summary*.

The resulting report *Tourism 2020 Vision: Volume 7: Global Forecasts and Profiles of Market Segments* is structured in five chapters. The first chapter examines the development of tourism in the world in the 1990s and the global tourism prospects for the period to the year 2020 and assesses the tourism policy and strategy implication of a number of tourism 'Megatrends'. The second chapter summarises the quantitative forecasts by region. The third chapter deals with the key developmental and marketing factors governing the forecasts for the period to 2020. Finally, the fourth chapter analyses the ten most dynamic market segments during the next decades.

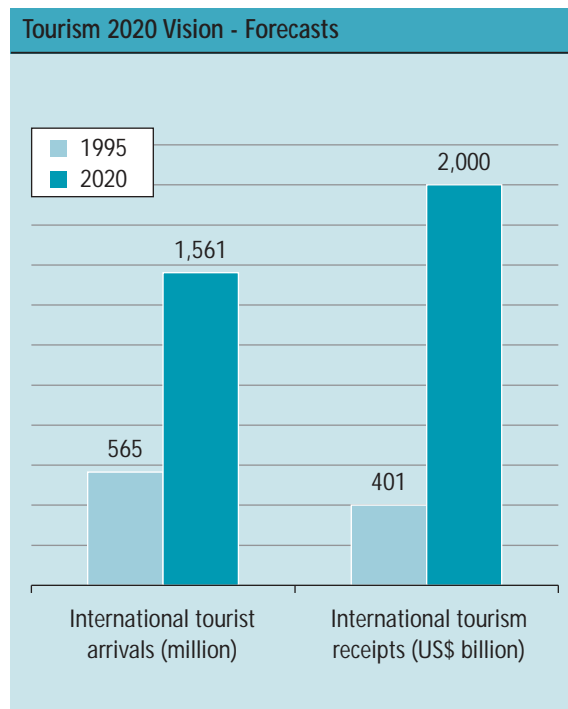
In addition, there are three appendices containing methodological, technical and reference information.

1 Global Tourism Prospects

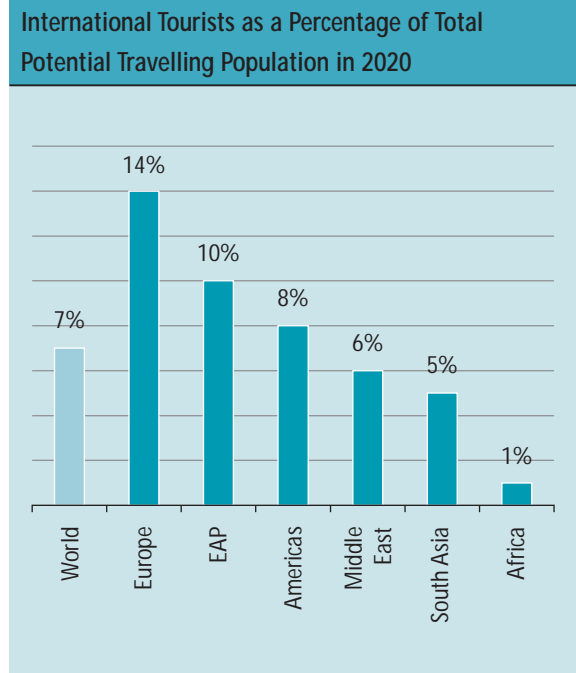
1.1 The World of Tourism in 2020

The world in the year 2020 will be characterised by the penetration of technology into all aspects of life. It will become possible to live one's life with limited exposure to other people, with automated service the norm, and full access to, and exchange of, information on everything possible from one's own home. In consequence, people will crave the human touch; and tourism will be the principal means through which they seek to achieve this.

By the year 2020, tourists will have conquered every part of the globe as well as engaging in low orbit space tours, and maybe moon tours. The *Tourism 2020 Vision* study forecasts that the number of international arrivals worldwide will increase to almost 1.6 billion in 2020. This is 2.5 times the volume recorded in the late 1990s. The number of people travelling will continue to boom in the 21st century. The most striking characteristic of the development of tourism in the last half century has been its ongoing surprisingly strong growth. Although the pace of growth will slow down to a forecast average 4 per cent a year -which signifies a doubling in 18 years-, there are no signs at all of an end to the rapid expansion of tourism.



Receipts from international tourism (excluding transport) are projected to reach US\$ 2 trillion* in 2020. By the year 2020 more than US\$ 5 billion will be spent each day on foreign tourism, excluding the costs of international transport. The long-term view of institutions such as the World Bank is that annual output growth in the developing world will be a mid-to-high 4 per cent, with that of industrialised countries around 2.5 cent or better. As a result, global Gross Domestic Product (GDP) will practically double in the forecast period. This will mean more income spread over larger and new layers of the population in various parts of the world. An ever-growing share of this income will be spent on travelling abroad.



These figures represent sustained average annual rates of growth. The anticipated growth rate for tourism volume measured in international tourist arrivals amounts to 4.1 per cent a year – well above the maximum probable expansion of around 3 per cent per year in the world's wealth.

Despite the great volumes of tourism forecast for 2020, it is important to recognise that international tourism still has much potential to exploit. If the international tourist arrivals figures are adjusted to numbers of active international tourists (through the application of factors to take account of tourists visiting more than one country per trip, and multiple trip taking), the proportion of the world's population engaged in international tourism is calculated at just 3.5 per cent. If a further filter is applied to eliminate those persons who through age, illness/infirmity or financial resources are unable to undertake international travel, this level of penetration of the "real" potential population in international tourism in 2020 can be seen to be 7 per cent – truly an industry still in its infancy.

While the *Tourism 2020 Vision* study focuses exclusively on international tourism, domestic tourism remains much more important, both in activity and financial terms. Over the forecast period of 25 years, most industrialised countries will come close to their ceiling for domestic tourism in respect to the proportion of the participating population and the incidence of their participation. The main growth in domestic tourism will be in the developing countries of Asia, Latin America, the Middle East and Africa where the proportion of the population actively participating in domestic tourism will increase strongly.

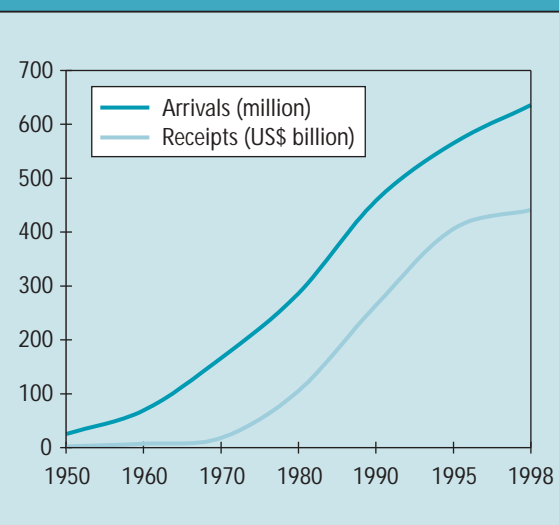
* 2*10¹² or 2 million times a million

1.2 Performance in the 1990s

Since 1950, when international travel started to become accessible to the general public, tourist activity has risen each year at an average rate of 7.1 per cent from 25 million to 565 million in 1995, and by 12.4 per cent based on international tourism receipts (at current prices and excluding spending on international transport) from US\$ 2.1 billion to US\$ 406 billion.

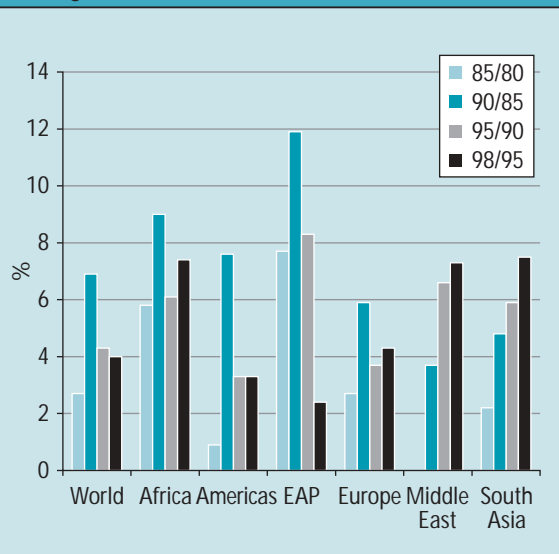
Continued strong growth in worldwide international tourist arrivals in the first half of the 1990s – 4.3 per cent per year, only half a percentage point below the rate of increase achieved over the 1980s – indicates the resilience of tourism in the face of the economic downturn in the early 1990s. The most buoyant regions between 1990-1995 proved to be: the Middle East (6.6 per cent per year growth in arrivals), East Asia and the Pacific (8.3 per cent per year), South Asia (5.9 per cent per year) and Africa (6.1 per cent per year), with below average performance only in Europe (3.7 per cent per year) and the Americas (3.3 per cent per year).

Growth in International Tourist Arrivals and Receipts, 1950-1998



The intraregional - long-haul split of international tourist arrivals has stayed constant between 1990 and 1995 at 82:18. There are marked differences between the regions with intraregional arrivals dominating in 1995 in Europe (88 per cent), East Asia and the Pacific (79 per cent), the Americas (77 per cent) and Africa (58 per cent), while long-haul arrivals are the principal category for South Asia (76 per cent) and the Middle East (58 per cent).

International Tourist Arrivals Average Annual Growth Rate



Between 1995 and 1998 the Asian financial crisis took its toll on tourism growth, particularly in East Asia and the Pacific. In 1996 the performance of East Asia and the Pacific was still strong with a 9.4 per cent increase in arrivals. However, the financial crisis that broke out in 1997 stunted any growth in arrivals in the region and produced a fall of about 1 per cent for two years in a row. This abrupt drop was visible

in worldwide tourism performance as well. While the increase in international tourist arrivals worldwide in 1996 of 5.7 per cent was stronger than the average achieved over the previous five years, growth decreased to 3.4 per cent in 1997 and 3.0 per cent in 1998. Overall, nevertheless, tourism has prospered in the late 1990s. Except for East Asia and the Pacific, the other regions improved or equalled growth rates compared to 1990-1995. South Asia, Africa and the Middle East all showed a steady and sustained growth of over 7 per cent a year on average between 1995 and 1998. Europe increased by an average of 4.3 per cent a year and Americas by 3.3 per cent.

Table 1.2 International Tourist Arrivals, 1980-1998: World and by Region (million)

	1980	1985	1990	1995	1998
Total	285.9	327.1	457.2	565.4	636.6
Africa	7.3	9.7	15.0	20.2	24.9
Americas	61.4	64.3	92.8	108.9	119.9
East Asia/Pacific	21.5	31.1	54.6	81.4	87.4
Europe	186.0	212.0	282.7	338.4	383.8
Middle East	7.5	7.5	9.0	12.4	15.3
South Asia	2.2	2.5	3.2	4.2	5.2
Market share (%)					
Total	100	100	100	100	100
Africa	2.6	3.0	3.3	3.6	3.9
Americas	21.5	19.7	20.3	19.3	18.8
East Asia/Pacific	7.5	9.5	11.9	14.4	13.7
Europe	65.1	64.8	61.8	59.8	60.3
Middle East	2.6	2.3	2.0	2.2	2.4
South Asia	0.8	0.8	0.7	0.7	0.8
Average Annual Growth Rate (%)					
	1980-1985	1985-1990	1990-1995	1995-1998	1980-1998
Total	2.7	6.9	4.3	4.0	4.5
Africa	5.8	9.0	6.1	7.4	7.0
Americas	0.9	7.6	3.3	3.3	3.8
East Asia/Pacific	7.7	11.9	8.3	2.4	8.1
Europe	2.7	5.9	3.7	4.3	4.1
Middle East	0.0	3.7	6.6	7.3	4.1
South Asia	2.2	4.8	5.9	7.5	4.8

Source: World Tourism Organization (WTO)

(Actual data as in WTO database July 2000)

Notes: (a) Intraregional includes arrivals where country of origin is not specified

(b) Long-Haul is defined as everything except intraregional travel

1.3 NTA Survey

Overview

For the *Tourism 2020 Vision* study, the main goal was to prepare long-term forecasts by each of WTO's sub-regional pairs (i.e. 44 in total). A survey was conducted in late 1997/early 1998 with WTO's NTA membership, from which we received 85 responses, of which 13 were from the Africa, 21 from the Americas, 20 from East Asia and the Pacific, 22 from Europe, 5 from the Middle East and 4 from South Asia.

A follow up survey was undertaken in January 1998 with 12 major Asian NTAs in order to revise tourist forecasts in the light of the Asian financial crisis. A third survey was conducted in September 1998, which involved 15 Asian NTAs, in response to the deepening economic turmoil in the region. The programme of direct enquiry with NTAs gave the WTO team guidance on anticipated strong growth sources, and key marketing and promotional initiatives and trends.

Findings

- Due to the ever-increasing competition amongst destinations, NTAs are intensifying their promotional activity. The survey showed that over three-quarters of the NTAs surveyed intend to increase their promotional spending, particularly abroad, and that their marketing strategy needs to be more aggressive.
- There has been a significant increase in joint venture promotion with the private sector, with almost 80 per cent of NTAs looking at ways of linking up with their local private sector, whilst around half stated that they are looking at ways to co-operate with the foreign private sector.
- In developed tourism destinations, especially those in Europe, many tourist offices are diversifying their tourism product to encourage the generation of new markets, spreading demand away from the more traditional areas such as cities and coastal regions.
- There are increasing numbers of NTAs developing and using web sites as a means of promotion, with 60 per cent of all respondents currently using or intending to use the Internet for marketing in the near future. The North American region leads the way in this respect, followed by Europe and East Asia and the Pacific. However, many countries in Africa are also studying the development of Internet web sites to promote their tourism product.

There is a growing awareness and promotion of environmental issues within the tourism sector, particularly among developing countries. There is a trend towards the promotion of conservation, as well as restoration of national arts and culture, and tourism resources. The NTAs are also attempting to sensitise the private sector in the issues of environmental sustainability, in order to provide products that are more economically viable and socially acceptable without reducing the quality of the product. This necessitates a long-term strategic approach.

1.4 Major Determinants and Influences

Tourism's scale and shape is determined by a range of factors. Some continue to exert an influence decade after decade; others have an effect for a period. The principal determinants and influences that will impinge on the development and growth of tourism activity in the period up to 2020 are identified as being:

Economy

- Post-war economic recovery in the industrialised countries led to rising personal incomes and free time availability - the fundamentals to engage in tourism, i.e. time and money. Looking to the future, it is anticipated that for the long term continued moderate-to-good rates of global economic growth are anticipated by major global financial and economic institutions. The old tigers will recover and new tigers will emerge (China, India, Brazil, Russian Federation). Economic factors will thus remain positive for tourism.
- The introduction of the euro is expected to have a positive effect on the tourism of the countries involved.

Major determinants and influences:

- Economy
- Technology
- Facilitation
- Safety
- Demography
- Globalisation
- Localisation
- Social-environmental awareness
- Living and working environments
- "Experience" economy
- Marketing

Technology

- The key development is in information and communication technology. New possibilities becoming available as part of new or already existing technology are substantially transforming both supply (reservation, management, marketing, business-to-business and business-to-consumer communication, etc.) and demand. The increasingly sophisticated successive generations of systems that are providing instant and interactive access to tourism product offerings are giving tourists unprecedented control over how they spend their time and money. At the same time, it is resulting in a changed focus of operation for travel distributors in response to the threats or opportunities, depending on how you look at it, posed by electronic home shopping.
- Technological advances are also expected to continue to affect the field of transport technology. Commercial jet aircraft technology application made flying to foreign destinations technically possible and affordable for an increasingly large proportion of the population. More fuel-efficient aircraft progressively reduced real costs of international travel. Future developments are for ever larger capacity aircraft and better availability of appropriate aircraft, that is seats and other facilities and performance related to a wide variety of route types, which permit better "matching" of aircraft types according to demand. The implication is yet cheaper air travel, not at the rate achieved in the 70s and 80s but nonetheless some additional cost reduction. On

the other hand, however, it will be a challenge in itself to deal with the shadow sides of the anticipated increased demand. Much depends on the capability to address problems related to congestion, delays, pollution and safety.

Facilitation

- Particularly relevant for tourism are the efforts aimed at the removal of barriers to international travel by means of the ongoing liberalisation of transport and other forms of deregulation. In the past this played a key role as national controls on travel through visas etc were progressively eased as tourism was recognised as an economic sector to be encouraged. This process continued into the 90s with the easing of travel to former Soviet Bloc countries, and will continue into the 21st century. The implications are: firstly, fewer countries require visas; and secondly, passports may ultimately be replaced by technology-driven systems of personal check such as hand geometry or retina inspection. A step further are initiatives like the Schengen agreement with the objective of abolishing frontier controls between, currently, 15 European countries, allowing people to travel without passports or border checks.

Safety

- As tourism will not flourish to destinations in civil turmoil, at war, or where tourists' health or security is perceived to be under threat, safety of travel should be included as a fundamental or foundation factor. Conflict, disaster and incidents can strongly influence tourism's health and growth. A lot depends, however, on how such negative events are dealt with. The good news is that experience in different parts of the world has shown repeatedly that tourism almost without exception turns out to be very resilient and manifests a strong capacity for recovery. The destinations that deal most effectively with negative events will best limit their impact. In general, harm can be considerably reduced by an open and sensible approach addressing the problems clearly and professionally instead of trying to deny them. First of all, it is of course indispensable to put an effective as possible protection of tourists in place. In dealing with incidents, it is wise to stress and preferably to show that they are isolated and do not present a danger to visitors.

Demography

- There will be a continuation of the trend of ageing populations in the industrialised countries. Associated with that are the contracting workforces in those countries. There will be less young people to feed into the system. In response to this, there will be more south-to-north migration. The implications of this scenario is both continued growth in tourism by older market segments, and also increased travel for the purpose of visiting family and friends (VFR) between the north and the south by the large volume of migrants in industrialised countries.
- Another demographic trend is the further erosion of the traditional western household through rising divorce rates and later marriage and family building. The implication for tourism of this is that there are more different types of households or household segments for the travel and

tourism industry to cater for. Apart from singles, we now have single parents with child (or children) with their own particular requirements from travel and tourism service suppliers.

Globalisation

- Tourism, like politics and the economy in general, will have to deal with the trend of globalisation, i.e. the growing power of international economic and market forces and the consequent decline in the ability of individual States to control their economies and of private corporations in limited geographic spheres of operation to dominate domestic markets. The impact on tourism is that more power will be obtained by the relatively small number of global travel and tourism networks achieving their globalisation not only through vertical and horizontal integration but through diagonal integration, economies of both scale and scope, and their huge investment in electronic databases and marketing.

Localisation

- At the other end of the scale to globalisation is localisation. Particularly in developing countries the conflict is likely to intensify between identity and modernity. More groups defined by ethnicity, religion and social structure, will demand to be recognised and treated as important with their own special rights.
- In this whole debate, tourism is centre stage and there are two consequences. First, the questioning -the increasing questioning- of the form and scale of tourism development and marketing in those societies. But, on the upside, there seems likely to be enormous opportunity for the development of tourism experiences related to the cultural and natural resources of these subsets of society.

Socio-Environmental Awareness

- The public awareness of socio-cultural and environmental issues is likely to grow in the coming years. After the big impact achieved in the 80s up to the Rio Summit of 1992, environmental issues went slightly off the boil but are back again with the arrival of the new Millennium. This awareness will be further increased by media reporting on major problems such as threat to rainforests, pollution, global warming, coral reef bleaching and issues like the dwindling water supplies worldwide resulting in a proportion of the world's population living under stress conditions. The proportion will rise from a quarter to two-thirds by 2025, with the displacement of populations by development projects, whether for dams or tourism activity. These reports in the media are likely to lead to increased scrutiny on the part of the public in destination decision making. For new tourism development the requirement to be sustainable will be more than ever decisive.

Living and Working Environments

- The growing urban congestion that is taking place, and that is going to continue to take place, in both the industrialised and developing worlds leads to the increasingly felt need to engage in discretionary tourism to escape and/or to indulge.
- Changing work practices (i.e. less full time employment, more contract work) result in more but shorter holidays, and less distinction between work and leisure time (manifested through an increase in combined work and pleasure trips).
- The greater pressure on “time” and rising “stress” levels leads to growing emphasis on the means of “escape” through inter alia holidays – particularly to long-haul, exotic destinations. The above two trends are not contradictory but reflect different responses to the same phenomenon.

Change from “Service” to “Experience” Economy

- The industrialised world is in transition from the service to the experience economy, with the peaking of the service economy in such countries already achieved. The focus is switching to delivering unique experiences that personally engage the consumer and the very clear implication of that for tourism is the need to differentiate tourism product development and marketing, both by destination and operator.

Marketing

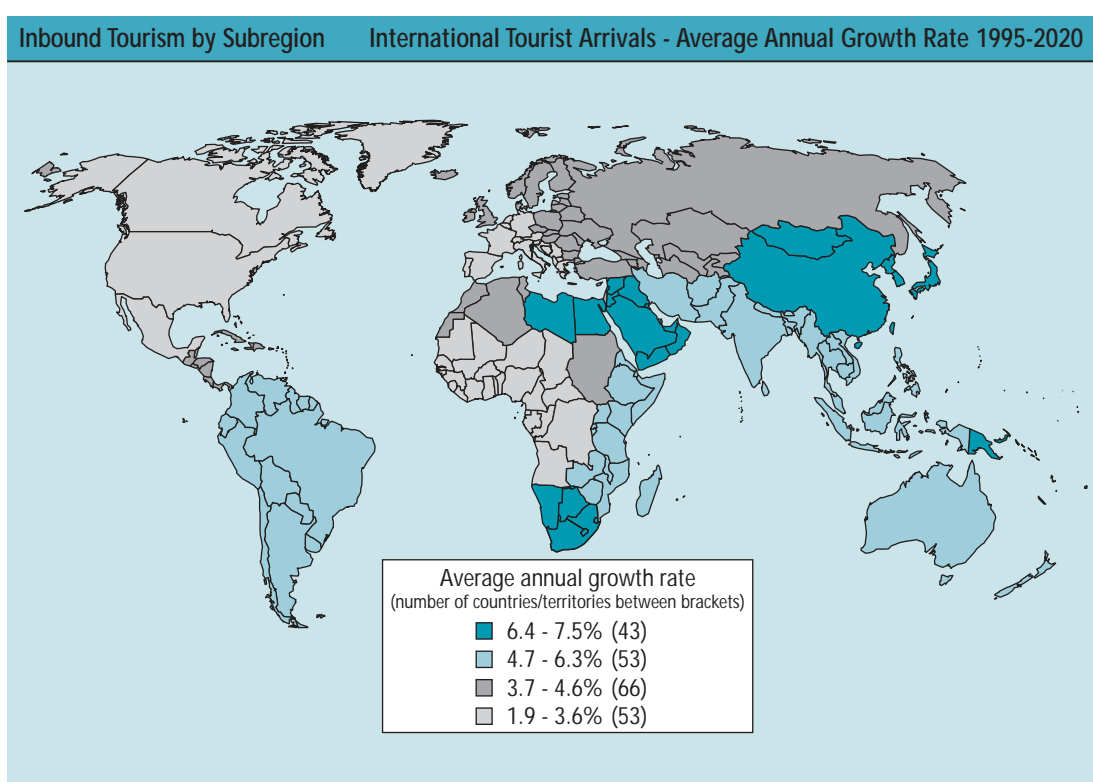
- The big challenge in marketing will be to deal effectively with the ever increasing and diversifying array of desires, interests and tastes on one hand, and the tourism products offered in response, on the other hand. The use of electronic technology will enable the more ready and accurate identification of market segments and niches and to communicate with them more effectively. This facilitates micro marketing, both of tourism destinations and service providers.

Most of the factors detailed exert their influence in combination and are going to produce a polarisation of tourist tastes and supply. The result will be an evolution towards a large scale “mainstream” tourism involving the movement of large volumes to extensively developed destinations on one hand and, on a smaller scale, “individualised” tourism, alternative or new tourism, on the other hand. Both of these are likely to prosper over the next 25 years.

1.5 Forecasts to 2020

Inbound Tourism

International tourist arrivals are forecast to top 1 billion in 2010 and reach over 1.6 billion in 2020. These volumes represent an overall average annual rate of growth in the period 1995-2020 of 4.1 per cent, with the only slackening of growth rate being between 1995 and 2000 in consequence of the Asian financial crisis (i.e. 1995-2000 3.4 per cent per year; 2000-2010 4.2 per cent per year; 2010-2020 4.5 per cent per year).



By region the prospected development of international tourism shows the following pattern:

- Europe will continue to be the most visited tourist destination in the world with a projected total of 717 million tourists for the year 2020. The anticipated growth rate of 3.1 per cent per year, however, is one point below the world average, resulting in a decline in market share from 60 per cent to 46 per cent.
- East Asia and the Pacific, increasing at 6.5 per cent per year, will pass the Americas (up 3.9 per cent per year) as the second largest receiving region, holding a 25 per cent market share in 2020 as against 18 per cent by the Americas. Destinations of East Asia and the Pacific will continue the strong performance achieved during the 1980s and 1990s. Because of the economic and financial troubles in the region in the late 1990s for the short run the forecasts have been adjusted downwards. It is anticipated however that the patterns of international tourism will have re-established themselves in line with the initial *Tourism 2020 Vision* study's expectations by 2010.

- Growth prospects for the Americas are seen as more sluggish, particularly for North America, whereas forecasts for South and Latin America and the Caribbean are much more promising.
- Africa and the Middle East are seen as having good prospects, and growth rates are predicted to remain above average. The respective shares will record some increase to 5.0 per cent and 4.4 per cent by 2020. With an expected growth rate of 7.1 per cent a year, 3 points above the world average, the Middle East will be the fastest growing region.
- Although comparatively small, the volume of international tourist arrivals in South Asia is expected to reach 19 million in 2020, almost five times higher than in 1995. As a result the market share will increase to 1.2 per cent in 2020.

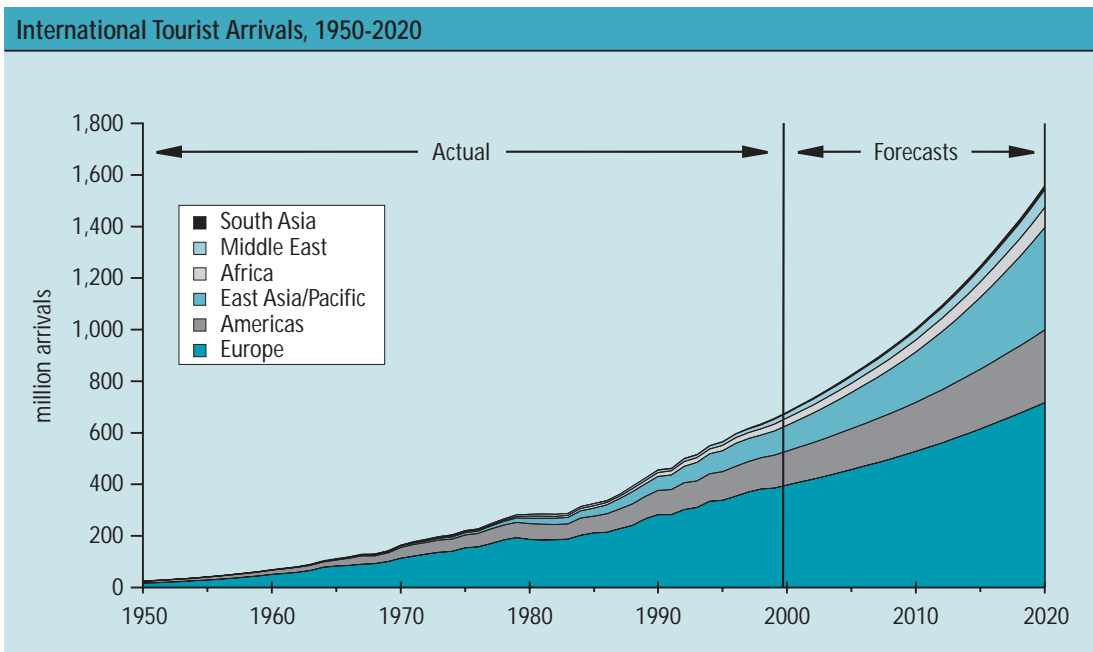
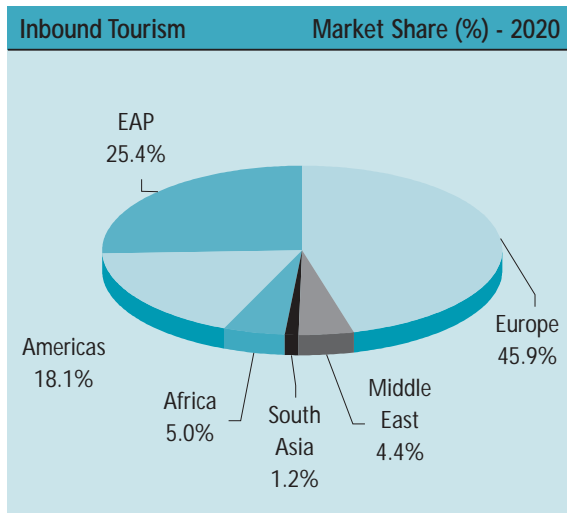
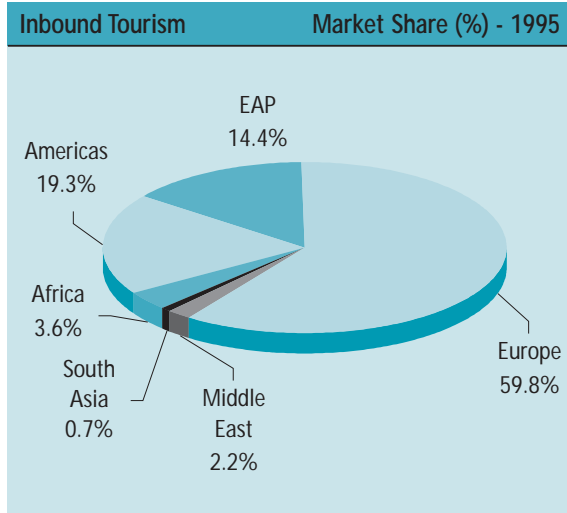


Table 1.5a WTO Tourism 2020 Vision: Forecast of Inbound Tourism, World by Regions
International Tourist Arrivals by Tourist Receiving Region (million)

	Base Year	Forecasts		Average Annual Growth Rate (%)	Market share (%)	
	1995	2010	2020	1995-2020	1995	2020
	Total	565.4	1,006	1,561	4.1	100
Africa	20.2	47	77	5.5	3.6	5.0
Americas	108.9	190	282	3.9	19.3	18.1
East Asia and the Pacific	81.4	195	397	6.5	14.4	25.4
Europe	338.4	527	717	3.0	59.8	45.9
Middle East	12.4	36	69	7.1	2.2	4.4
South Asia	4.2	11	19	6.2	0.7	1.2
Intraregional (a)	464.1	791	1,183	3.8	82.1	75.8
Long-Haul (b)	101.3	216	378	5.4	17.9	24.2

Source: World Tourism Organization (WTO)

(Actual data as in WTO database July 2000)

The top ten tourist receiving countries will see a major change with China becoming the leading destination by 2020. Hong Kong (China), if treated as a separate entity, will also become one of the main destinations. Also entering the top ten will be the Russian Federation, while the fast growth Asian destinations of Thailand and Singapore along with South Africa will move rapidly up the league table, albeit not reaching the top ten.

Table 1.5b World's Top Destinations, 2020

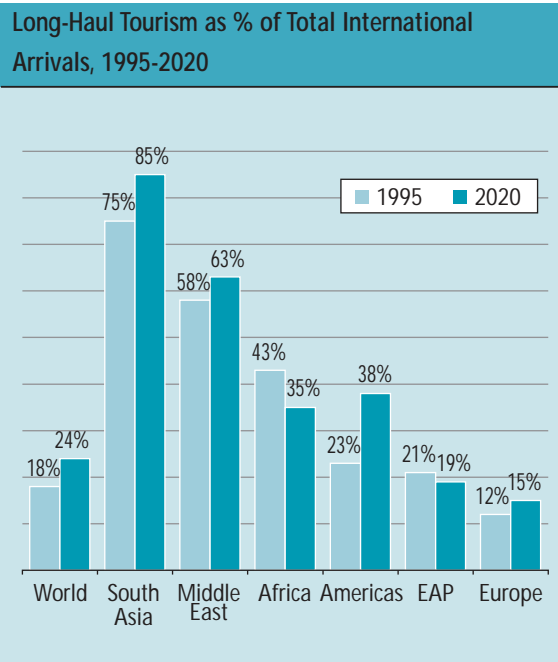
Country	Base Year	Forecasts	Average Annual Growth Rate (%)	Market share (%)	
	(million)	(million)	1995-2020	1995	2020
	1995	2020			
1. China	20.0	130.0	7.8	3.5	8.3
2. France	60.0	106.1	2.3	10.6	6.8
3. United States	43.3	102.4	3.5	7.7	6.6
4. Spain	38.8	73.9	2.6	6.9	4.7
5. Hong Kong (China)	10.2	56.6	7.1	1.8	3.6
6. Italy	31.1	52.5	2.1	5.5	3.4
7. United Kingdom	23.5	53.8	3.4	4.2	3.4
8. Mexico	20.2	48.9	3.6	3.6	3.1
9. Russian Federation	9.3	48.0	6.8	1.6	3.1
10. Czech Republic	16.5	44.0	4.0	2.9	2.8
Total (1-10)	273.0	716.2	3.9	48.3	45.9

Source: World Tourism Organization (WTO)

(Actual data as in WTO database July 2000)

Further and More Often

One of the principal features of the expansion of international tourism over the 25-year period is the rise in the long-haul share of arrivals, although intraregional flows will remain predominant. By 2020 tourists will be travelling farther and farther. Long-haul travel is anticipated to grow at an average annual rate of 5.4 per cent, while intraregional travel increases at a rate of only 3.8 per cent a year. As a result the long-haul share of worldwide tourist arrivals will rise from 18 per cent in 1995 to 24 per cent in 2020. Intraregional tourism will subsequently decrease from 82 per cent to 76 per cent of total tourist arrivals over the same period. Of the worldwide arrivals in 2020, 378 million will be long-haul travellers and 1,183 million will be intraregional.



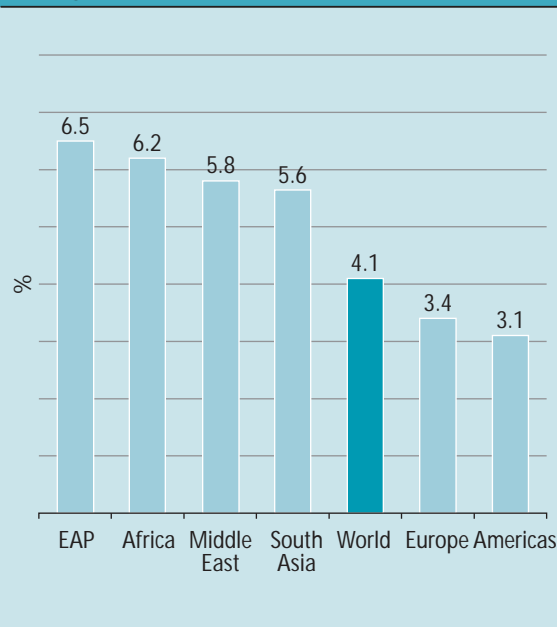
By region some interesting changes are likely to occur. Whereas long-haul will increase its share in Europe (from 12 to 15 per cent between 1995 and 2020), the Americas (from 23 to 38 per cent), the Middle East (from 58 to 63 per cent) and South Asia (from 75 to 85 per cent), the large volumes of first time Asian travellers (most of whom will choose close-by destinations) will result in a rise in the intraregional share in East Asia and the Pacific (from 79 per cent in 1995 to 81 per cent in 2020). The same pattern, though in a substantially less marked way reflecting the relative affluence of the peoples of the two regions, will be seen in Africa with the intraregional share of arrivals rising from 57 per cent in 1995 to 65 per cent in 2020.

Not only will tourists travel further away but also more often. With large blocks of free time difficult to find by many consumers, multiple holiday taking rather than extending the length of stay of the main holiday will be the major trend, leading to a much higher frequency of travel each year by the most active participants. The multiplication of short holidays in Europe, North America and recently Asia illustrates this trend.

Outbound Tourism

Europe will remain the world's largest generating region, being responsible for almost one half of all tourist arrivals worldwide despite its modest annual growth rate between 1995-2020 (3.4 per cent per year). During the first decades of the new Millennium the pent up demand for travel of East Asia and the Pacific will ensure that the region becomes the second largest for outbound travel (average growth of 6.5 per cent per year over the period 1995-2020) forcing the Americas (3.1 per cent per year) into third place. Africa, the Middle East and South Asia will each show above average growth rates (all between 5.6 and 6.2 per cent per year).

**World: Outbound Tourism by Generating Region
 Average Annual Growth Rate, 1995-2020**



**Table 1.5c WTO Tourism 2020 Vision: Forecast of Outbound Tourism, World by Region
 International Tourist Arrivals from the World by Tourist Generating Region (million)**

	Base Year	Forecasts		Average Annual Growth Rate (%)	Market share (%)	
	1995	2010	2020	1995-2020	1995	2020
Total	565.4	1,006	1,561	4.1	100	100
Africa	13.9	36	62	6.2	2.5	4.0
Americas	107.8	173	232	3.1	19.1	14.9
East Asia and the Pacific	84.3	193	405	6.5	14.9	25.9
Europe	312.6	520	729	3.4	55.3	46.7
Middle East	8.6	21	35	5.8	1.5	2.2
South Asia	4.3	10	17	5.6	0.8	1.1
Not specified	33.9	54	81	3.6	6.0	5.2
Intraregional	464.1	791	1,183	3.8	82.1	75.8
Long-Haul	101.3	216	378	5.4	17.9	24.2

Source: World Tourism Organization (WTO)

(Actual data as in WTO database July 2000)

Considering which countries will be the main producers of tourists abroad, the list remains largely the same with the presence of the major industrialised countries - Germany, Japan, the United States, the United Kingdom and France. However, there are two important newcomers: first, China entering at fourth place with a forecast of generating 100 million arrivals by 2020, predominantly to close-by destinations; and, second, the Russian Federation generating over 30 million arrivals.

Table 1.5d World's Top Outbound Countries, 2020

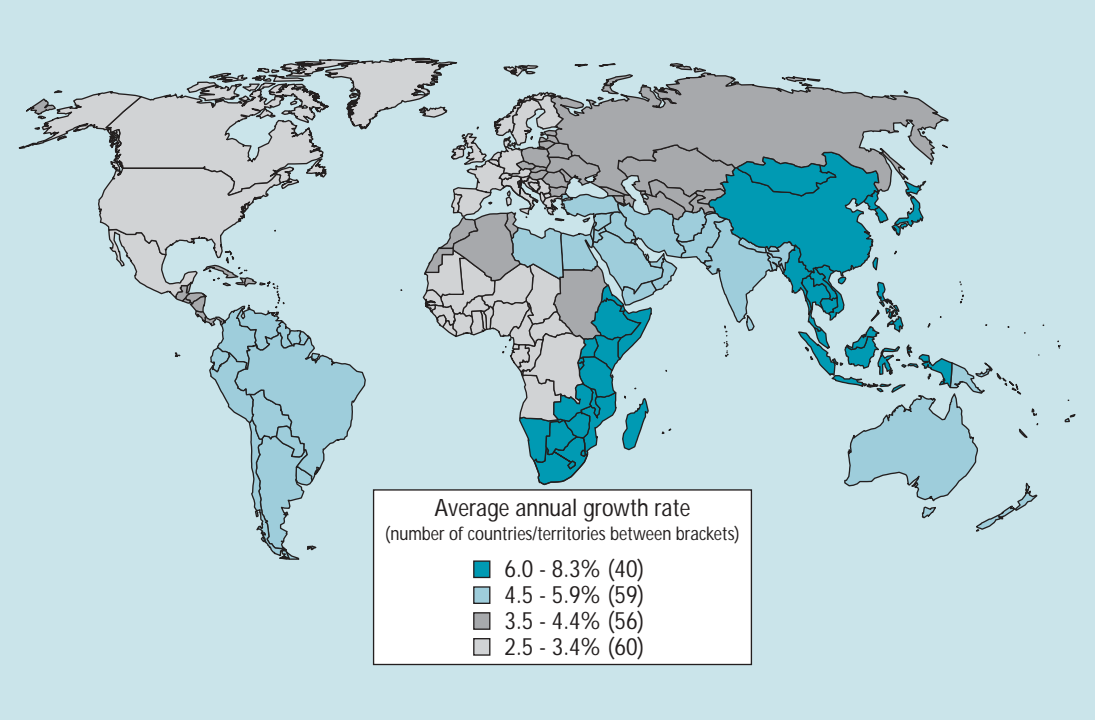
	Base Year (million)	Forecasts (million)	Average Annual Growth Rate (%)	Market share (%)	
	1995	2020	1995-2020	1995	2020
1. Germany ^a	75	153	2.9	13.3	9.8
2. Japan ^a	23	142	7.5	4.1	9.1
3. United States ^a	63	123	2.7	11.1	7.9
4. China ^b	5	100	12.8	0.9	6.4
5. United Kingdom ^b	42	95	3.3	7.4	6.1
6. France ^a	21	55	3.9	3.7	3.5
7. Netherlands ^a	22	46	3.0	3.8	2.9
8. Italy ^a	16	35	3.1	2.9	2.3
9. Canada ^b	19	31	2.0	3.4	2.0
10. Russian Federation ^b	12	31	4.0	2.1	2.0
Total (1-10)	298	809	4.1	52.7	51.8

Source: World Tourism Organization (WTO)

a Base year 1996 data

b Absolute numbers for 1995 are estimates based on inbound tourism data from destinations

Outbound Tourism by Subregion International Tourist Arrivals - Average Annual Growth Rate 1995-2020



1.6. Tourism Megatrends

This paragraph identifies some - a sample- of what have been called -borrowing from American futurologist John Naisbitt- "megatrends". The following major tourism megatrends will play an important role in policy and strategy during the next decades.

- The first tourism megatrend to be highlighted is the globalisation-localisation divide, two concurrent but apparently conflicting developments. Development sociologists and economists see a world increasingly polarised between the macro and the micro.

Globalisation facilitated and fostered by continuing advances in information technology and allied to the privatisation and deregulation movement is at one end of the continuum. All countries are integrally locked into the global economy; and no aspiring market leader can succeed without operating (or establishing networks in) all major industrialised and emerging markets.

The other end of the continuum is **localisation**. Populations are responding to this globalisation of economies, markets, systems and cultures by looking to their own identities.

The inevitable friction of these opposing global and local forces cannot be averted by the state, the market, or communities on their own, acting alone. Collective, collaborative and co-operative approaches are necessary to avoid the increased occurrence around the world of civil conflicts.

The travel and tourism sectors are mirroring the global-local polarisation process in their systems and structures. There are few fully global networks, though it does not take many to exert a stranglehold on world markets.

The spread of the multinational and transnational corporation in travel and tourism continues and will continue through their economies of scale and scope. These travel and tourism megagroups cater for a large volume of tourist movements, accommodation, mainstream or mass tourism; at the other end of the scale are niche operators offering special products and services, experiences to individuals and collections of tourists with their eclectic tastes.

Major Tourism Megatrends:

- Globalisation ↔ Localisation
Localisation ↔ Globalisation
- Polarisation of tourist tastes
- The tourist's "shrinking world"
- Electronic technology becoming all powerful
- Fast track travel
- Customers will "can the shots"
- Destination as "fashion accessory"
- Targeted product market development oriented to the three E-s:
 - ✓ Entertainment
 - ✓ Excitement
 - ✓ Education
- More destination focus on "image"
- Everyone chasing the Asian tourist
- Consumer led campaigns for sustainable tourism
- Increased socio-environmental consciousness ↔ the urge for travel consumption

The local level resistance and introverted response to globalisation provides the focus and opportunity for the development of tourist experiences related to the cultural and natural resources of these sub-sets of society. Research by organisations like the Stanford Research Institute and Angus Reid consistently find that between 10 and 15 per cent of discretionary travellers want the unusual, the alternative tourism experience. These tourists are characterised by being highly educated, mature, affluent, well travelled, environmentally aware and sensitive to the social and cultural traditions, systems and mores of the destinations they visit. They are responding to the demands of local groups to be heard, recognised and valued.

Of course, the divide is not as simple as indicated. Multinational and transnational corporations do not only cater for the mass beach resort market with the niche market operators focused on the educated traveller. Much tourism demand is now characterised by customisation based on the use of electronic technology, the Internet World Wide Web, etc. Segments are identified and products and services developed and marketed to publics that share characteristics, attitudes, behaviours and interests. The scale of the segment may not always be large but there are many where the airline or tour operator is able through the available technology to develop what appears to be, and in many instances is, a bespoke product or service. In other words, thinking global, acting local.

- The **polarisation of tourist tastes** refers to the already mentioned comfort-based demands at one extreme, and the adventure or education oriented at the other.
- The **tourist's world is shrinking**, aided by the proliferation of tourism offers, made possible by various technological advances and the fact that there will be no boundaries to tourism anywhere. Tourism will virtually reach every corner of the globe and beyond – into space.
- **Electronic technology** will become all powerful in influencing destination choice and distribution. The uptake of the use of electronic technology to buy or book travel and tourism products may not be as rapid as the proponents of this technology would like to believe. Clearly, however, this is going to bring about change in the way the public obtains, considers and acts on information concerning travel and tourism products, and it is certain that the distributors of these travel and tourism products will harness this technology for their own purposes.
- **Fast track travel** refers to things like the passport being replaced by the computer reading of hands, ticketless travel, plastification of travellers' cheques, and the use of smart cards. It is part of this whole process of facilitation of travellers in the consumer convenient society.
- The **customer will call the shots**. Increasingly travel and tourism will be a buyer's market with the use of technology such as CD-ROM atlases, Internet inspection of destinations, hotels, and other facilities. Brokers will be offering discounted rooms on Websites, and there will be on-line auctions of air tickets, hotel rooms and other travel products. There will be many ways in which the public can work the system to their own benefit.

- The **destination will become a fashion accessory**. Not perhaps a new concept as it has always been fashionable to be seen in certain places around the world. However, when more and more of the travelling public adopt this as a fundamental principle in their choice of destinations, it certainly has major implications for destinations. It is important to recognise that it is not necessarily those destinations with the most fancy 5-star facilities that become the most desired places to visit. "In vogue" destinations can be places that have just started their tourism development but have a certain "cachet" associated with them.

The implication for destinations is to continually monitor their perceptions in the market places so that they can maximise advantage of this and take steps to counteract developments that may push them out of fashion.

- Product development and marketing are mirror images of each other. One has to match the other. In the first quarter of the next century **product and marketing development will be increasingly targeted and increasingly theme-based**. Broadly oriented to one or a combination of three E-words: **Entertainment, Excitement and Education**.
- There will be **more destination focus on image**, the way destinations are perceived. Unless the image is right it will not be possible for a destination to develop and diversify and expand its drawing power in the way it would wish to.
- Virtually all destinations will direct their promotional dollars towards the **Asian source markets**, and this is likely to last for a considerable period of time. Although the East Asia and the Pacific market will expand very rapidly in percentage terms, the volume increases generated by the traditional source markets of Europe and North America will still be very large, and indeed the volume increases from Europe will be larger than those from East Asia and the Pacific.
- There will be a growing impact of **consumer-led campaigns for sustainable tourism development** and for trade in tourism to be "fair" in its distribution of the rewards of tourism to destinations, particularly in the developing country destinations which provide the services for tourism. Although sustainability and fair trade are seen by the South as a northern obsession, since the bulk of tourists come from the industrialised countries, it is important that destinations acknowledge and orientate their policy development and marketing process and strategies towards the principles of sustainable tourism development.
- There will be a **growing conflict** in the minds of the travelling public **between this increased socio-environmental consciousness** (manifested in increased scrutiny of destinations for sustainability in approaching their tourism development) **versus the urge for travel consumption** on the other.

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Georgios Drakopoulos (307-99-294)
Thursday, March 03, 2011 2:33:30 AM

2 Forecasts of Regional Trends

This chapter presents an overview and summary of the main results for each of the six WTO regions. The full analysis can be found in the corresponding six regional volumes of the *Tourism 2020 Vision* series. Each of these regional volumes contains an examination of changes, performance and trends in the 1990s followed by detailed regional forecasts. Inbound and outbound tourism forecasts are included, as well as principal origin-destination forecasts on a subregional and (in selected major cases) a country-country basis.

Furthermore, in this chapter, apart from the WTO region forecasts, results are presented for the groups of Mediterranean destinations and Indian Ocean destinations, two special country groupings cutting across the WTO standard regional grouping of countries.

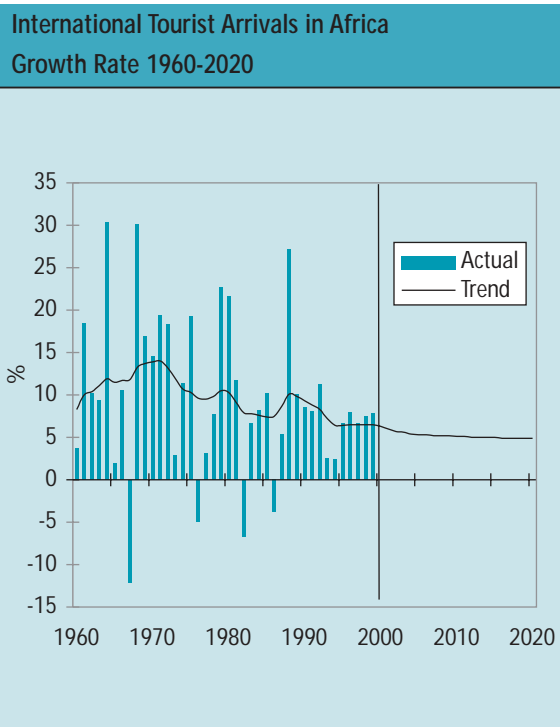
2.1 WTO regions

2.1.1 Africa

Several factors will influence the growth of tourism in the forecast period. The governments in Africa will have control over some factors but there will be other factors they cannot control that will impinge on their industries. Regional tourism and co-operation between nations is increasing with several countries marketing themselves together as multi-destination holidays. Security will remain an important issue, as tourism will not flourish in destinations suffering from civil turmoil or war.

The importance of health and hygiene within countries and resorts will increase. HIV is a particular problem in sub-Saharan Africa, and the marked number of cases in Eastern and Southern Africa could impact tourism flows.

The growth of the eco-tourism sector will favour Africa. The region will attract a higher proportion of experience travellers – both those on eco-tourism theme tours and those seeking out newly developing or “in recovery” destinations which are in abundance in the region. Equally, the adventure segment is also likely to grow as the African safari market begins to mature. Many destinations are starting to offer more niche products such as trekking, crocodile camps, and white water rafting.



Inbound Tourism

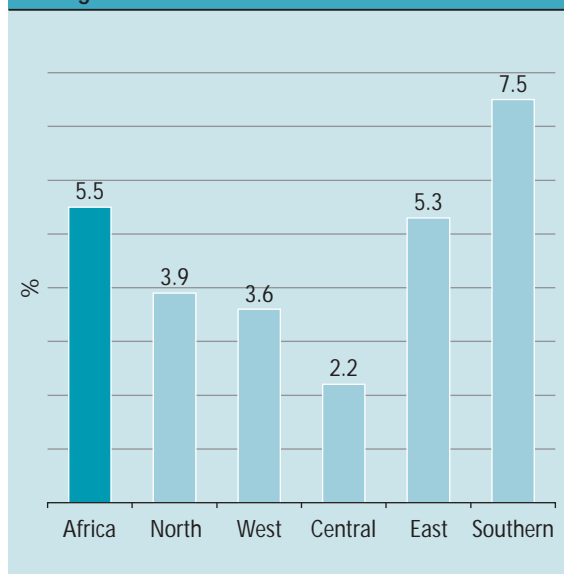
There were 20.2 million international tourist arrivals in Africa in 1995 (24.9 million in 1998), and these are expected to increase to 77 million by 2020. This represents an annual average growth rate of 5.5 per cent for the period 1995-2020, almost one-and-a-half percentage points above the global growth rate of 4.1 per cent (table 2.1.1a). As a result the overall share of arrivals to the Africa region is expected to increase over the forecast period from 3.6 per cent of worldwide arrivals in 1995 to 5.0 per cent in 2020.

The North Africa sub-region is presently the most visited sub-region in Africa, attracting 7.3 million visitors in 1995, and 8.7 million in 1998. However, the growth rate for arrivals in the North Africa region will be the third lowest in Africa over the period 1995-2020, at only 3.9 per cent per year, over one-and-a-half percentage point below the overall growth rate for Africa of 5.5 per cent. Consequently it will lose market share to the other sub-regions. Arrivals in the Southern Africa sub-region are expected to grow the fastest, and by 2020, this region will attract almost half of all the arrivals in Africa.

The East Africa region will remain Africa's third most visited sub-region, with 17 million visitors forecast in 2020, two million less than the 19 million expected to visit North Africa. The low growth rates expected in Central and West Africa will lead to only 600,000 and 4.6 million arrivals respectively in 2020.

By country, it is anticipated that in the year 2020, South Africa will remain Africa's number one destination with over thirty million international arrivals, followed by Morocco and Tunisia with close to 9 million arrivals each. The next six African destinations in the year 2020 will be Zimbabwe, Botswana, Namibia, Kenya, Reunion and Mauritius, each recording between 1.5 and 5 million international arrivals.

Africa: Tourist Arrivals by Subregion
 Average Annual Growth Rate 1995-2020



The highest growth rates for the 1995-2020 period are forecast for South Africa (+8.0 per cent a year on average), Madagascar (+7.9 per cent), Reunion (+7.1 per cent), Namibia (+6.7 per cent), Comoros (+6.6 per cent), and Botswana (+6.0 per cent). Growth in South Africa in particular and in the Southern African destinations in general will be fuelled both by arrivals from neighbouring countries in the region as well as from long-haul source markets.

As a result of the strong growth from an already considerable base, South Africa's market share will increase from 22 to 39 per cent of the regional total. More mature destinations such as Tunisia -although still more than doubling its number of arrivals-, will see their market share decrease.

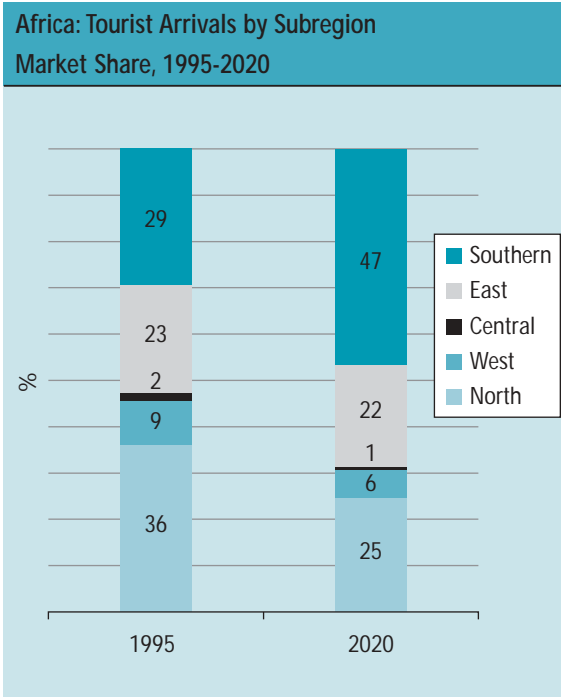


Table 2.1.1a WTO Tourism 2020 Vision: Inbound Tourism, Selected African Destination Countries
Forecasts of International Tourist Arrivals by Receiving Subregion and Destination Country (000)

	Actual	Forecasts		Market Share		Average Annual
	1995	2010	2020	1995	2020	Growth 1995-2020
Total Africa	20,155	46,996	77,316	100	100	5.5
North	7,305	12,804	19,056	36.2	24.6	3.9
Algeria	520	1,009	1,304	2.6	1.7	3.7
Morocco	2,602	5,467	8,693	12.9	11.2	4.9
Tunisia	4,120	6,305	8,915	20.4	11.5	3.1
West	1,895	3,337	4,617	9.4	6.0	3.6
Central	345	457	594	1.7	0.8	2.2
East	4,692	10,462	17,011	23.3	22.0	5.3
Comoros	23	58	114	0.1	0.1	6.6
Kenya	896	1,402	2,024	4.4	2.6	3.3
Madagascar	75	310	505	0.4	0.7	7.9
Mauritius	422	1,046	1,548	2.1	2.0	5.3
Reunion	304	859	1,689	1.5	2.2	7.1
Seychelles	121	185	237	0.6	0.3	2.7
Somalia	10	12	16	0.0	0.0	1.8
Tanzania	285	626	905	1.4	1.2	4.7
Zimbabwe	1,539	2,933	4,569	7.6	5.9	4.4
Southern	5,918	19,936	36,037	29.4	46.6	7.5
Botswana	644	1,564	2,752	3.2	3.6	6.0
Namibia	461	1,277	2,314	2.3	3.0	6.7
South Africa	4,488	15,267	30,523	22.3	39.5	8.0

Source: World Tourism Organization (WTO)

(Actual data as in WTO database July 2000)

Generating Regions

By 2020, 41 million (over 53 per cent) arrivals in Africa will be from the Africa region, a figure which rises to 50 million (or 65 per cent), if 'not specified' is included.

Long-haul travel to Africa will grow at 4.7 per cent a year between 1995-2020 as against 6.0 per cent for intraregional travel. This increase in intraregional travel, due to increased wealth within many of the African nations, will transform tourism in the region. In 1985, more Africans travelled long-haul than intraregionally. By 2020, there will be almost twice as many intraregional trips taken than long-haul ones.

Europe remains by far Africa's most important long-haul generating market, growing from 6.6 to 19.6 million in the year 2020. However, the average annual growth rate for Europe (4.4%) is the smallest one in comparison with the other regions. The Americas and the Middle East also show growth rates slightly below the overall average for inbound tourism to Africa.

Arrivals from South Asia are expected to grow the fastest over the forecast period, with an annual growth rate of 7.1 per cent. However, this will be from a small base of around only 60,000 arrivals, thus only growing to 350,000 by 2020.

Although arrivals from the East Asia and the Pacific region in Africa are also small, and the effect of the Asian financial crisis restricted the growth of Asian tourism to Africa over the period 1995-2000, the strong growth expected from this region in the forthcoming decades will provide the East Asia and the Pacific region with the second strongest annual growth rate of arrivals to Africa over the period 1995-2020.

	Base Year	Forecasts		Average Annual Growth Rate (%)	Market Share (%)	
	1995	2010	2020	1995-2020	1995	2020
Total	20.2	47.0	77.3	5.5	100	100
Africa	8.6	24.3	41.3	6.5	42.4	53.4
Americas	0.6	1.4	2.3	5.2	3.2	3.0
East Asia and the Pacific	0.5	1.3	2.5	6.9	2.3	3.2
Europe	6.6	12.7	19.6	4.4	33.0	25.4
Middle East	0.8	1.6	2.7	5.0	3.9	3.5
South Asia	0.1	0.2	0.4	7.1	0.3	0.5
Not specified	3.0	5.5	8.6	4.3	14.8	11.2
Intraregional	11.5	29.8	49.9	6.0	57.2	64.5
Long-Haul	8.6	17.2	27.4	4.7	42.8	35.5

Source: World Tourism Organization (WTO)

(Actual data as in WTO database July 2000)

Outbound Tourism

The *Tourism 2020 Vision* study forecasts that there will be over 62 million outbound tourist arrivals generated from Africa in the year 2020. This represents an annual growth rate over the period 1995 to 2020 of 6.2 per cent, over two percentage points above the global average of 4.1 per cent.

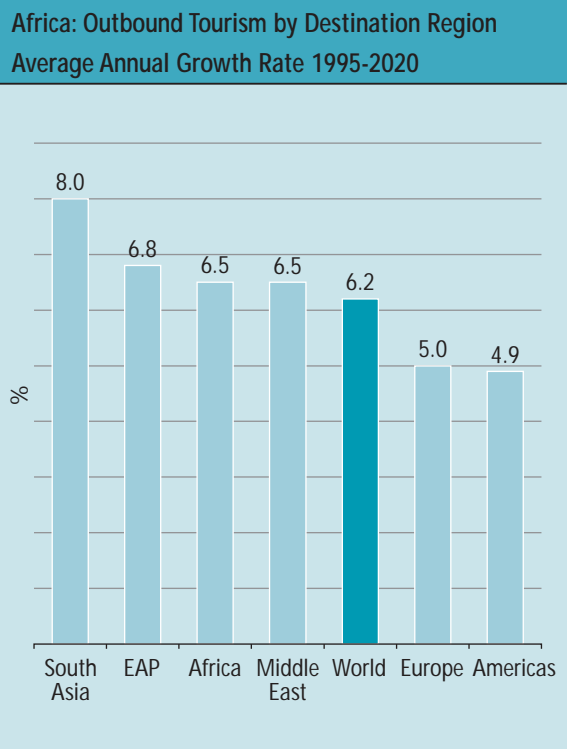
Whilst Africa will remain the world's fourth largest tourist generating region over the period 1995-2020, it will gain some market share, growing from 2.5 per cent in 1995 to 4.0 per cent in 2020. This growth will primarily be at the expense of the European and American outbound markets, which will decline in market share over the period, although will still more than double in absolute numbers.

Outbound travel from Africa to other African destinations (intra-regional travel) will dominate total African tourism over the forecast period. By 2020, over 41 million tourists will travel within the Africa region.

Intra-regional travel from Africa will grow at almost one percentage point above the rate of long-haul travel between 1995 and 2020. In 1995, just over 61 per cent of all travel from Africa was intra-regional. By 2020, this will increase to over 66 per cent.

However, the growth rate of outbound travel to South Asia, East Asia and the Pacific and the Middle East will exceed or equal intra-regional travel, although the volumes of travellers will be considerably smaller.

Southern Africa will remain the largest generating sub-region within Africa over the forecast period. However, its importance will grow considerably over the 25 years to 2020, generating over 30 million tourists by the year 2020. The growth rate of the outbound Southern Africa region will grow at over two percentage points above the overall outbound rate for Africa (6.2 per cent a year over the period 1995-2020).



2.1.2 Americas

Several factors will influence tourism in the Americas over the next two decades. Economic issues will continue to play a large part in tourist flows, and recently (in 1997 and 1998) the West Coast, Hawaii and Guam have been particularly hit by the fall of tourists from Asia following the economic crisis in the region.

However, the cruise sector is showing phenomenal growth and is expected to grow well into the next decade. The Caribbean is the most popular cruise destination and several destinations, such as Mexico and Cuba, are looking to increase their cruise market. The wedding market, especially in the Caribbean sub-region, is showing strong growth, with many operators reporting a growth of between 100 and 300 per cent over the last five years.

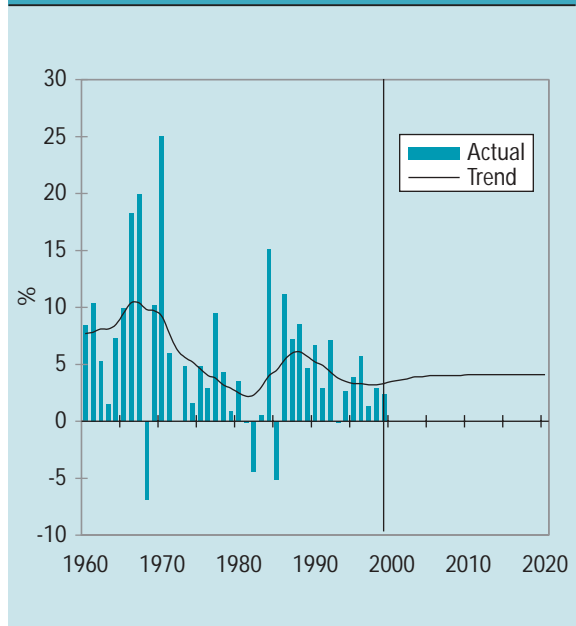
The Americas maintains strong levels of new investment both in established and emerging destinations in the region. Developments include new theme parks and hotel and resort developments.

Inbound Tourism

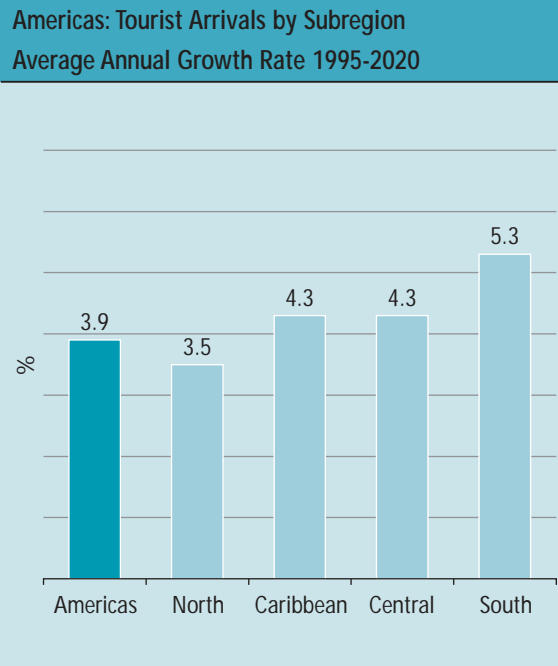
There were 109 million international tourist arrivals in the Americas in 1995 (120 million in 1998), and these are expected to increase to 283 million by 2020. This represents an annual average growth rate of 3.9 per cent for the period 1995-2020, slightly below the global growth rate of 4.1 per cent.

Consequently the overall share of arrivals in the Americas is expected to edge downwards from 19.3 per cent of worldwide arrivals in 1995 to 18.1 per cent by 2020. By 2010 the Americas will have lost its position as number two receiving region to the much faster growing East Asia and the Pacific region which is forecast to receive 19.4 per cent of world arrivals in 2010 and 25.4 per cent in 2020.

**International Tourist Arrivals in the Americas
 Growth Rate 1960-2020**



North America is the principal tourist receiving subregion in the Americas, attracting 80 million visitors in 1995, and 85 million in 1998. Its market share of arrivals within the region, however, will fall from 74 per cent in 1995 to 68 per cent in 2020, reflecting a growth rate slightly below the average for the Americas. The three other subregions will grow above the Americas average and consequently will increase their market share. South America will overtake the Caribbean between 1995 and 2020, as the second largest subregion.



The analysis by country reveals that in the year 2020, the United States will remain the number one destination of the Americas with over one hundred million international tourist arrivals. Mexico and Canada will follow with almost 50 and 40 million arrivals respectively. Brazil will record 14 million arrivals and Argentina, Cuba, Dominican Republic, Chile and Jamaica each are expected to record between 2 and 8 million international arrivals.

The highest growth rate for the 1995-2020 period is forecast for Cuba (+9.2 per cent a year on average). The Dominican Republic and the South American destinations Argentina, Brazil and Chile are all expected to record growth rates of around 5 per cent a year. Growth in the destinations of South America will be fuelled both by arrivals from neighbouring countries in the region as well as from long-haul source markets.

The already more mature destinations of North America are anticipated to grow at a rate slightly below the average for the region as a whole. As a consequence, their market share will decrease somewhat, although the number of arrivals will still more than double. Destinations in South America, Central America and the Caribbean almost without exception, will see their market share increase.

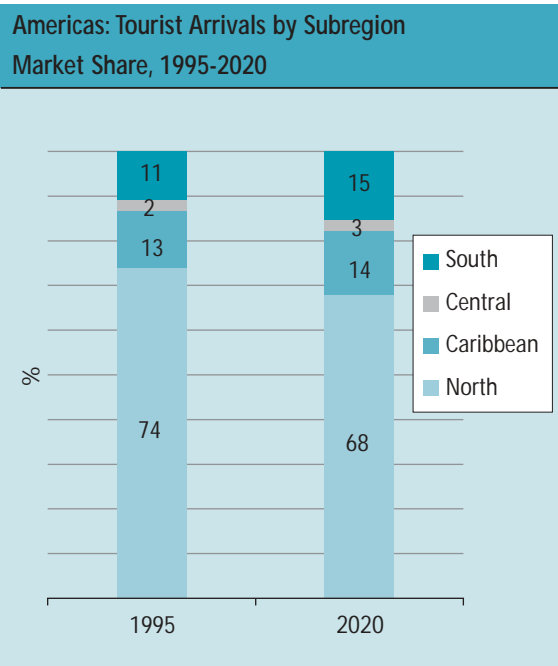


Table 2.1.2a WTO Tourism 2020 Vision: Inbound Tourism, Selected Americas Destination Countries

Forecasts of International Tourist Arrivals by Receiving Subregion and Destination Country (million)

	Actual	Forecasts		Market Share		Average Annual
	1995	2010	2020	1995	2020	Growth 1995-2020
Total Americas	108.9	190.4	282.3	100	100	3.9
North	80.5	131.9	192.0	73.9	68.0	3.5
United States	43.3	72.8	102.4	39.8	36.3	3.5
Mexico	20.2	32.5	48.9	18.6	17.3	3.6
Canada	16.9	26.5	40.6	15.5	14.4	3.6
Caribbean	14.1	26.6	40.0	12.9	14.2	4.3
Dominican Republic ⁽¹⁹⁹⁶⁾	1.9	4.2	6.7	1.8	2.4	5.0
Cuba	0.7	3.4	6.7	0.7	2.4	9.2
Jamaica	1.1	1.8	2.5	1.1	0.9	3.1
Central	2.6	5.0	7.5	2.4	2.7	4.3
South	11.8	26.9	42.8	10.8	15.2	5.3
Brazil ⁽¹⁹⁹⁸⁾	4.8	9.0	14.1	4.4	5.0	5.0
Argentina	2.3	5.1	8.0	2.1	2.8	5.1
Chile	1.5	3.1	4.8	1.4	1.7	4.7

Source: World Tourism Organization (WTO)

(Actual data as in WTO database July 2000)

Generating Regions

By the year 2020, the Americas will receive 283 million tourist arrivals, of which 160 million (almost 57%) will be intraregional. Including the “not specified” origin element brings the intraregional share to 62 per cent, well below the 77 per cent share of total arrivals in the Americas in 1995 as well as the global average for intraregional arrivals of 76 per cent.

Long-haul travel to the Americas will grow at 6.0 per cent a year between 1995-2020 as against 3.0 per cent for intraregional travel. As a result of this difference in growth rate, the share of long-haul arrivals will increase substantially.

Of the long-haul generating regions, the East Asia and the Pacific region will show the strongest growth after its countries achieve economic recovery over the course of the next decade, followed by Europe (especially Central/Eastern Europe) and Africa (led by South Africa).

Table 2.1.2b WTO Tourism 2020 Vision: Forecast for Americas

International Tourist Arrivals to Americas by Tourist Generating Region (million)						
	Base Year	Forecasts		Average Annual Growth Rate (%)		Market Share (%)
	1995	2010	2020	1995-2020	1995	2020
Total	108.9	190.4	282.3	3.9	100	100
Africa	0.3	0.5	0.9	4.9	0.2	0.3
Americas	78.9	122.9	159.9	2.9	72.4	56.6
East Asia and the Pacific	8.5	18.1	40.0	6.4	7.8	14.2
Europe	15.9	38.3	65.5	5.8	14.6	23.2
Middle East	0.2	0.4	0.5	4.2	0.2	0.2
South Asia	0.2	0.4	0.6	4.0	0.2	0.2
Not specified	4.9	9.7	14.9	4.5	4.5	5.3
Intraregional	83.8	132.7	174.7	3.0	76.9	61.9
Long-Haul	25.1	57.7	107.5	6.0	23.1	38.1

Source: World Tourism Organization (WTO)

(Actual data as in WTO database July 2000)

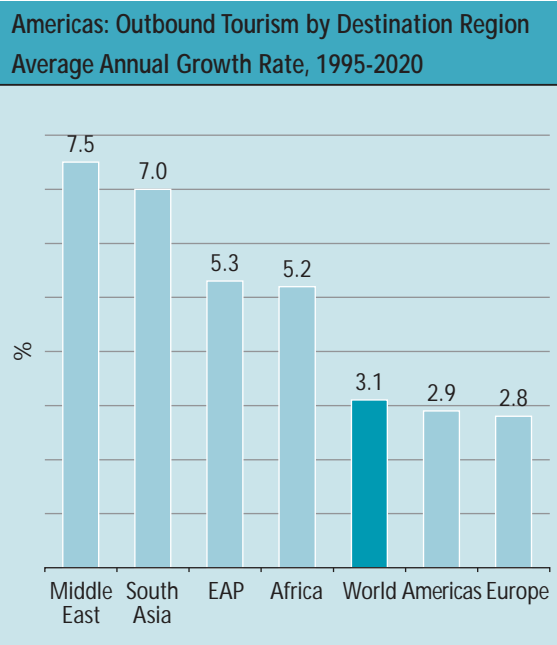
Outbound Tourism

The *Tourism 2020 Vision* study forecasts that there will be over 232 million outbound tourist arrivals generated from the Americas region in the year 2020. This represents an annual growth rate over the period 1995 to 2020 of 3.1 per cent, one percentage point below the global average of 4.1 per cent.

The Americas region will lose market share of outbound tourists, falling from 19 per cent in 1995 to 15 per cent in 2020. Consequently, by the year 2010 it will lose the position as the world's second largest tourist generating region in favour of East Asia and the Pacific which will record 26 per cent of market share in 2020.

Long-haul outbound travel by the residents of countries in the Americas will grow faster than intraregional travel. By 2020, outbound arrivals in interregional destinations by residents of the Americas will top 72 million, against 160 million arrivals in destinations within the Americas. The intraregional : interregional ratio for outbound Americas travel will change from 73:27 in 1995 to 69:31 in 2020.

Europe will remain the largest long-haul destination region for tourists from the Americas with an estimated 44 million arrivals in 2020, up from 22 million in 1995. The corresponding growth rate is only 2.8



per cent a year, however, is the lowest of all regions. Arrivals from Americas to East Asia and the Pacific are forecast to grow at a rate of 5.3 per cent a year, with numbers increasing from the 5.6 million of 1995 to 20.5 million in 2020.

The highest growth rates will be recorded in outbound travel to the Middle East (7.5 per cent a year) and South Asia (7.0 per cent a year), although the volumes of travellers will be considerably smaller.

The North America subregion will remain by far the largest tourist generating area within the Americas (i.e. 76 per cent in 2020), despite the lowest growth rate of all the Americas subregions (i.e. 2.8 per cent a year, 1995-2020). South America will grow in importance as a source subregion for tourists, i.e. up from 12 per cent of all outbound arrivals from the Americas in 1995 to 17 per cent in 2020.

2.1.3 East Asia and the Pacific

The economic crisis that affected many major Asian countries in 1997, and continued throughout 1998 had a marked effect on the region's tourism industry. Intra-regional tourism declined significantly, and whilst long-haul tourism did increase due to many destinations becoming more attractive as a consequence of favourable exchange rates, it was not enough to redress the balance.

Whilst there will be continued growth in long-haul arrivals to the Asian region, there will be only limited growth in the number of short-haul, intra-regional arrivals in the short term. However, the mid-long term prospects for Asian outbound flows remain strongly positive even if it will be the early-mid part of the next decade before Asian consumer confidence recovers to the level recorded before the crisis.

There is a global trend for holidays to be more than recreational, with physical and mental rejuvenation increasingly expected. Spiritual rejuvenation is also a growing need. There is an above average growth in religious tourism.

Scuba diving is one of the fastest growing sectors of the tourism trade. Diving is becoming increasingly popular amongst Asians themselves, particularly in Japan, Hong Kong and Taiwan (Pr. of China). There has been an improvement in dive operator performance over the past decade in the region, following bad publicity over unregulated diving.

Cruise and marine tourism will take off in a big way throughout the rivers, seas and oceans of Asia but major upgrading of standards and improved facilitation and port infrastructure will be necessary if Asia is to compete against the Mediterranean and the Caribbean in particular.

Inbound Tourism

There were over 81 million international tourist arrivals in East Asia and the Pacific in 1995 (87 million in 1998), and these are expected to increase to 397 million by 2020. This represents an annual average growth rate of 6.5 per cent for the period 1995-2020, almost 2.5 percentage points above the global growth rate of 4.1 per cent (table 2.1.3a).

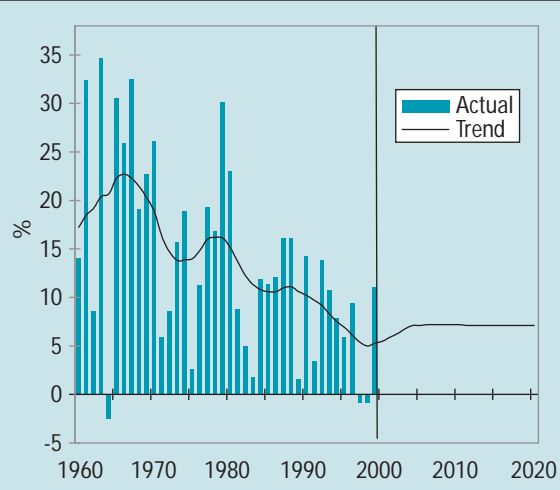
Thus, the overall share of arrivals in the East Asia and the Pacific region is expected to increase over the forecast period from 14.4 per cent in 1995 to 25.4 per cent in 2020. By 2010 East Asia and the Pacific will have taken over the number two position as tourist receiving region from the Americas.

The North-East Asia subregion is presently the most visited subregion in East Asia and the Pacific, attracting 44 million visitors in 1995. It will also be one of the fastest growing subregions, growing at 6.7 per cent per year over the period 1995-2020.

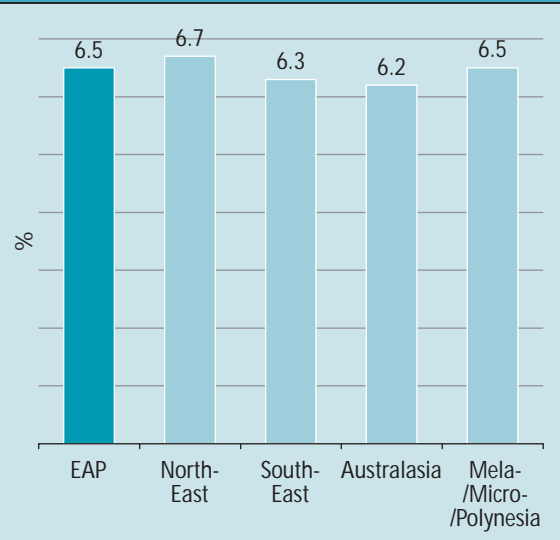
All the subregions will grow at rates between 6.2 per cent per year (Australasia) and 6.7 per cent per year (North-East Asia) over the period 1995-2020, and therefore all will gain an increased share of worldwide tourist arrivals.

In the year 2020, China will remain East Asia and the Pacific's number one destination with 130 million international arrivals. By this time China will also be the first destination in the world. The next most visited destination will be Hong Kong (China) with 56.6 million international tourist arrivals, followed by Thailand, Indonesia and Malaysia, countries that will receive 37, 27 and 25 million arrivals respectively. Australia, Singapore, Vietnam, Philippines, Republic of Korea and Japan are expected to receive between 18 and 10 million international tourist arrivals in the year 2020.

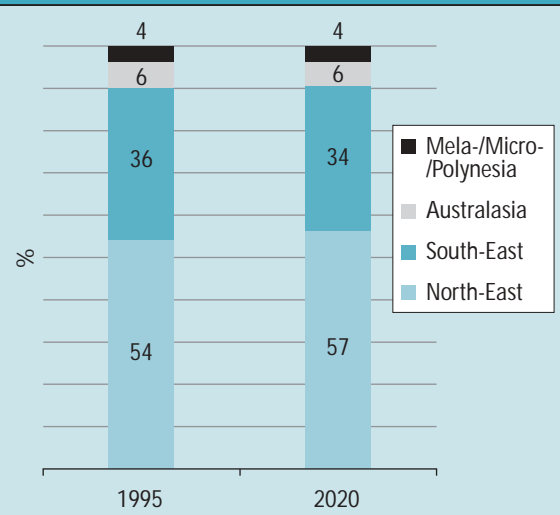
International Tourist Arrivals in East Asia/Pacific
Growth Rate 1960-2020



EAP: Tourist Arrivals by Subregion
Average Annual Growth Rate 1995-2020



EAP: Tourist Arrivals by Subregion
Market Share, 1995-2020



The highest growth rates for the 1995-2020 period are forecast for the South-East Asian Mekong countries, Lao People's Democratic Republic (+12.1 per cent a year on average) Myanmar (+10.0 per cent), Vietnam (+9.7 per cent) and Cambodia (+8.7 per cent). All these countries, except for Vietnam, will realise their growth from a small base. China will record the fifth highest average annual growth rate of 7.8 per cent. Philippines, Indonesia, Hong Kong (China) and Thailand will also record growth rates above the growth rate of 6.5 per cent a year for the East Asia and the Pacific region as a whole.

As a result of the strong growth from an already considerable base, China's market share will increase 8 points, from one-quarter to one-third of the regional total. Hong Kong (China), Indonesia and Vietnam will also see their market shares increase by more than one point. More mature destinations such as Japan, Republic of Korea, Macau (China), Singapore, Malaysia -although all still more than doubling or tripling numbers of arrivals- as a consequence, will face decreased market share.

Table 2.1.3a WTO Tourism 2020 Vision: Inbound Tourism, Selected East Asia and the Pacific Destination Countries
Forecasts of International Tourist Arrivals by Receiving Subregion and Destination Country (000)

	Actual	Forecasts		Market Share		Average Annual
	1995	2010	2020	1995	2020	Growth 1995-2020
East Asia/Pacific	81,355	195,235	397,241	100	100	6.5
North-East Asia	44,102	109,301	224,360	54.2	56.5	6.7
China	20,034	61,800	130,000	24.6	32.7	7.8
Hong Kong (China)	10,200	22,500	56,550	12.5	14.2	7.1
Republic of Korea	3,753	6,550	10,272	4.6	2.6	4.1
Japan	3,345	7,109	10,055	4.1	2.5	4.5
Macau (China)	4,202	6,058	9,274	5.2	2.3	3.2
South-East Asia	29,173	66,714	135,789	35.9	34.2	6.3
Thailand	6,952	17,573	36,959	8.5	9.3	6.9
Indonesia	4,324	11,957	27,385	5.3	6.9	7.7
Malaysia	7,469	13,095	25,046	9.2	6.3	5.0
Singapore	7,137	10,120	15,321	8.8	3.9	3.1
Vietnam	1,351	6,048	13,528	1.7	3.4	9.7
Philippines	1,760	5,307	11,293	2.2	2.8	7.7
Cambodia	220	855	1,779	0.3	0.4	8.7
Myanmar	117	610	1,258	0.1	0.3	10.0
Lao P. Dem. R.	60	501	1,032	0.1	0.3	12.1
Australasia	5,135	12,039	22,949	6.3	5.8	6.2
Australia	3,726	9,134	17,553	4.6	4.4	6.4
Mela/Micro/Polynesia	2,945	7,180	14,143	3.6	3.6	6.5

Source: World Tourism Organization (WTO)

(Actual data as in WTO database July 2000)

Generating Regions

Tourism growth in the region will be above all fuelled by the burgeoning demand from countries and territories within the region. Intraregional travel will grow at 6.6 per cent a year between 1995-2020 as against 6.2 per cent for long-haul travel to East Asia and the Pacific. By 2020, 309 million (almost 78%) of all arrivals in East Asia and the Pacific will be intraregional, a figure which rises to 322 million (or 81%), if 'not specified' is included.

Despite the Asian financial crisis restricting the growth of intraregional travel over the second half of the 1990s, strong growth from the residents of countries within the region for East Asia and the Pacific destinations is expected to resume in the first two decades of the new Millennium, providing the East Asia and the Pacific region with one of the strongest annual growth rates of arrivals (6.7 per cent per year) over the period 1995-2020.

Of the long-haul generating regions, Europe and Africa (from a small base) are expected to grow at rates equal to the rate for intraregional travel. Although the other regions show growth somewhat below the average for travel to East Asia and the Pacific, their rates are still substantial and, exceed without exception, the world average for outbound tourism.

Table 2.1.3b WTO Tourism 2020 Vision: Forecast for East Asia and the Pacific
International Tourist Arrivals to East Asia and the Pacific by Tourist Generating Region (million)

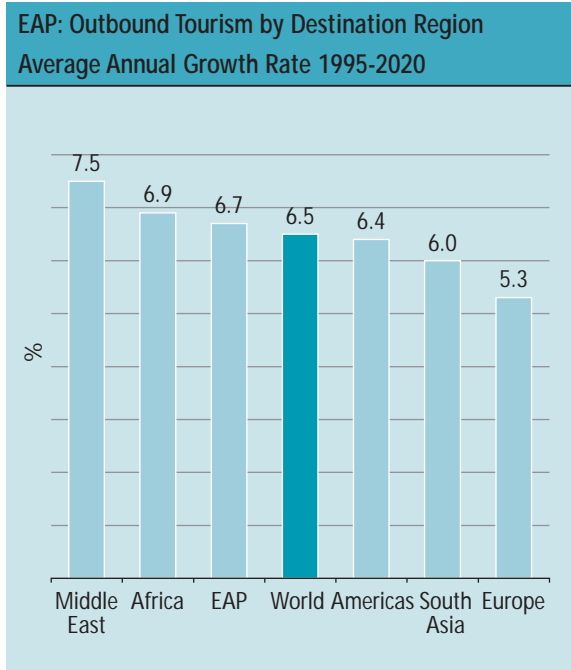
	Base Year	Forecasts		Average Annual Growth Rate (%)	Market Share (%)	
	1995	2010	2020	1995-2020	1995	2020
Total	81.4	195.2	397.2	6.5	100	100
Africa	0.4	1.1	2.0	6.8	0.5	0.5
Americas	5.6	12.3	20.5	5.3	6.9	5.2
East Asia and the Pacific	61.2	146.9	308.7	6.7	75.2	77.7
Europe	9.4	25.4	47.6	6.7	11.6	12.0
Middle East	0.3	0.6	0.9	4.5	0.4	0.2
South Asia	1.2	2.6	4.4	5.3	1.5	1.1
Not specified	3.2	6.4	13.1	5.8	3.9	3.3
Intraregional	64.4	153.3	321.9	6.6	79.2	81.0
Long-Haul	16.9	42.0	75.4	6.2	20.8	19.0

Source: World Tourism Organization (WTO)

(Actual data as in WTO database July 2000)

Outbound Tourism

The *Tourism 2020 Vision* study forecasts that there will be 405 million outbound tourist arrivals generated from East Asia and the Pacific in the year 2020. This represents an annual growth rate over the period 1995 to 2020 of 6.5 per cent, over two percentage points above the global average of 4.1 per cent. In fact, the East Asia and the Pacific region will exhibit the highest growth rate of all the regions worldwide. Consequently, the East Asia and the Pacific region will gain market share: East Asia and the Pacific residents will constitute over one-in-four tourist arrivals globally by 2020, as against 15 per cent in 1995.



Outbound travel from East Asia and the Pacific to other East Asia and the Pacific destinations (intra-regional travel) will dominate total regional tourist departures over the forecast period. By 2020, almost 309 million tourists will travel within the East Asia and the Pacific region.

Although both intra-regional and long-haul travel from East Asia and the Pacific will exhibit strong rates of growth over the forecast period, intra-regional travel will grow almost one percentage point faster. As a result the intra-regional share will increase from 63 to 67 per cent.

Inter-regional outbound travel from East Asia and the Pacific is forecast to grow at a rate of 6.7 per cent a year. The growth of travel to the Middle East and Africa is expected to exceed this rate (both from low base volumes), while travel to the Americas and South Asia will grow around or slightly below this rate. Travel to Europe, however, is forecast to experience a growth rate of more than one percentage point below the regional average in the period 1995-2020. Yet, tourist arrivals from East Asia and the Pacific to Europe still represent a share of 11 per cent of the market by 2020, which will keep Europe in the position of the preferred long-haul destination region for tourists from East Asia and the Pacific.

North-East Asia will remain the largest generating subregion within East Asia and the Pacific over the forecast period, generating over 293 million tourists by the year 2020 (of which 100 million from China). The North-East Asia region will also be the fastest growing outbound region over the period 1995-2020, at 6.8 per cent per year. All the other regions will lose some of their share of outbound tourism, as they will grow below the overall outbound rate of 6.5 per cent per year.

2.1.4 Europe

The European tourism industry faces ever-increasing levels of destination competition from both within and outside the region. A whole range of factors accounts for this competition (economic and financial development, political factors, demographic and social changes, technological innovations, etc.), including the promotional activities of competitor destinations through to less obvious exogenous variables.

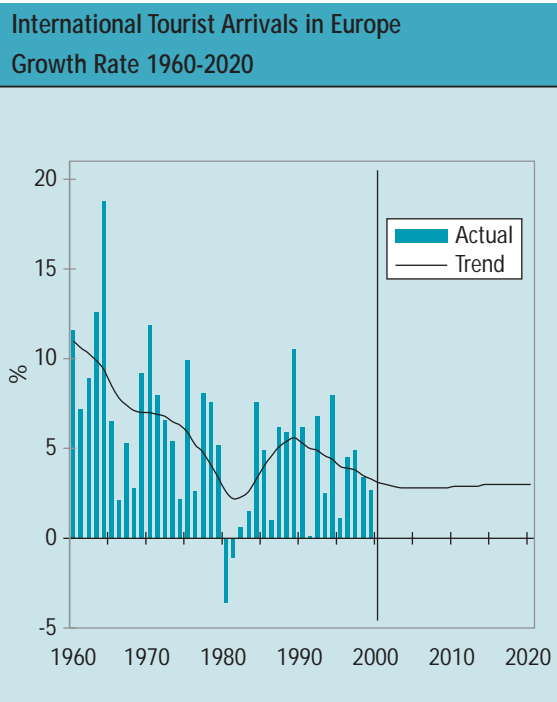
At the same time, an increased range of goods and services that vie with travel and tourism for discretionary time and spending will create another form of competitive pressure. The expanding range of leisure offers in residential areas (e.g. theme parks, entertainment, health clubs, sporting and cultural events) will lead to more shorter, close-to-home trips diverting such demand from longer trips further afield. It expects this trend to be especially marked in times of slower economic growth.

Several other factors will shape tourism in Europe over the next two decades. The introduction of the euro as a common currency in many European countries will increase the level of intra-European travel. European air deregulation has produced an influx of new, no frills, low cost airlines, and this has lowered pan-European airfares and increased the number of leisure trips, especially short breaks. The tourism industry has undergone an unprecedented level of consolidation over recent years, a feature set to continue at least in the near term. This activity is epitomised by the large German and UK tour operators, countries that account for the largest number of outbound European tourists. Tough price competition in European markets appears to be the main reason accounting for this consolidation.

Inbound Tourism

There were over 338 million international tourist arrivals in Europe in 1995, and these are expected to increase to 717 million by 2020 (Table 2.1.4a). This represents an annual average growth rate of 3.0 per cent for the period 1995-2020, a full percentage point below the global growth rate of 4.1 per cent.

Consequently the overall share of arrivals to the European region is expected to decrease over the forecast period from 60 per cent in 1995 to 46 per cent in 2020. East Asia and the Pacific (in particular), the Middle East, Africa and South Asia will all gain market share at Europe's expense.



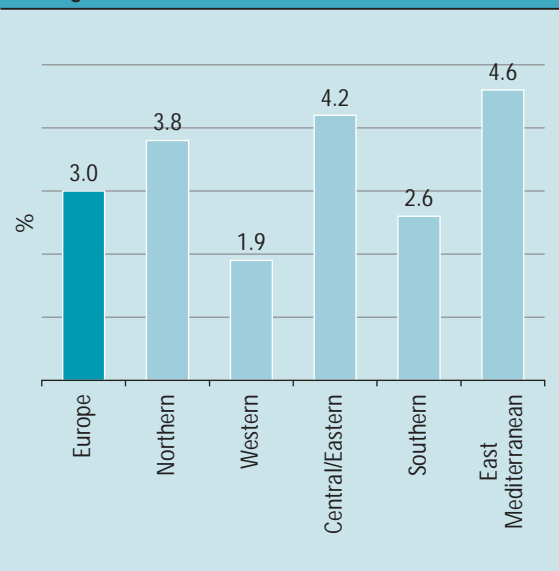
The Western Europe subregion is presently the most visited subregion in Europe, attracting 117 million visitors in 1995, and 131 million in 1998. However, the growth rate for arrivals in the Western Europe region will be the lowest in Europe over the period 1995-2020, at only 1.9 per cent per year. As a result, it will lose market share to the other subregions. Arrivals in the Central/Eastern subregion are expected to grow the fastest, and by 2020, Central/Eastern Europe will attract almost 40 million more visitors than Western Europe.

In addition to the Central/Eastern subregion, arrivals to the East Mediterranean and Northern subregions will also grow faster than the overall average for Europe. Arrivals to the Western and Southern subregion will lose some ground, with smaller growth rates than those for Europe as a whole.

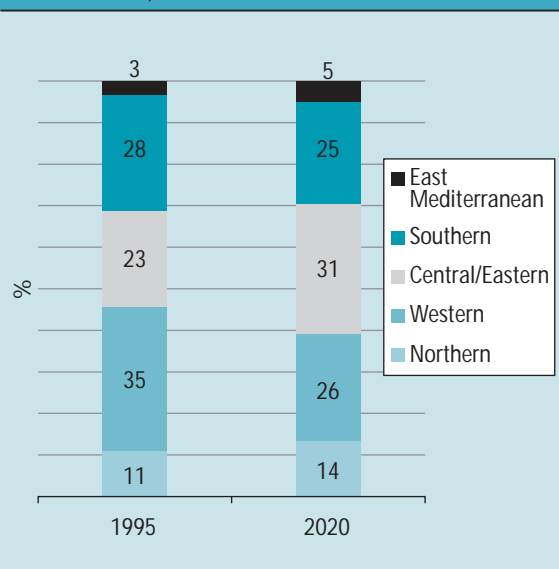
In the year 2020, France will remain Europe's number one destination with over one hundred million international arrivals. The next five European destinations in the year 2020 will be Spain, the United Kingdom, Italy, the Russian Federation and the Czech Republic, each recording between 40 and 75 million international arrivals.

The highest growth rates for the 1995-2020 period are forecast for Croatia (+8.4 per cent a year on average), the Russian Federation (+6.8 per cent), Slovenia (+6.0 per cent), Turkey (+5.5 per cent) and Bulgaria and Romania (both +4.6 per cent).

Europe: Tourist Arrivals by Subregion
 Average Annual Growth Rate 1995-2020



Europe: Tourist Arrivals by Subregion
 Market Share, 1995-2020



Recuperation of the Russian outbound market and the increasing prosperity in the CIS states will spur tourism growth in the destinations in the Central/Eastern part of Europe in general. On the European side of the Mediterranean, growth will concentrate in some of the eastern destinations, in particular Turkey, Croatia and Slovenia are poised for above-average tourism growth over the next two decades. Most of the more mature Mediterranean destinations on the other hand, will lose some market share, as they are expected to record growth rates slightly below the average for Europe as a whole. The lowest growth rates are forecast for the Central/Western European countries, Germany, Switzerland, Austria and Hungary.

Table 2.1.4a WTO Tourism 2020 Vision: Inbound Tourism, Selected European Destination Countries
Forecasts of International Tourist Arrivals by Receiving Subregion and Destination Country (million)

	Actual	Forecasts	Market Share		Average Annual
	1995	2020	1995	2020	Growth 1995-2020
Total Europe	338.4	717.0	100	100	3.0
Northern	37.6	96.6	11.1	13.5	3.8
United Kingdom	23.5	53.8	7.0	7.5	3.4
Western	116.7	185.2	34.5	25.8	1.9
France	60.0	106.1	17.7	14.8	2.3
Austria	17.2	23.1	5.1	3.2	1.2
Germany	14.8	20.0	4.4	2.8	1.2
Switzerland	11.5	17.4	3.4	2.4	1.7
Central/Eastern	78.9	223.3	23.3	31.1	4.2
Russian Federation	9.3	48.0	2.7	6.7	6.8
Czech Republic	16.5	44.0	4.9	6.1	4.0
Hungary	20.7	24.7	6.1	3.5	0.7
Bulgaria	3.5	10.6	1.0	1.5	4.6
Romania	2.8	8.5	0.8	1.2	4.6
Southern	93.7	177.0	27.7	24.7	2.6
Spain	38.8	73.9	11.5	10.3	2.6
Italy	31.1	52.5	9.2	7.3	2.1
Greece	10.1	17.1	3.0	2.4	2.1
Portugal	9.5	16.0	2.8	2.2	2.1
Croatia	1.3	10.0	0.4	1.4	8.4
Slovenia	0.7	3.1	0.2	0.4	6.0
Malta	1.1	1.8	0.3	0.3	2.0
East Mediterranean	11.4	34.8	3.4	4.9	4.6
Turkey	7.1	27.0	2.1	3.8	5.5
Israel	2.2	3.9	0.7	0.5	2.3
Cyprus	2.1	3.9	0.6	0.5	2.5

Source: World Tourism Organization (WTO)

(Actual data as in WTO database July 2000)

Generating Regions

Long-haul travel to Europe will grow at 4.0 per cent a year between 1995-2020 as against 2.9 per cent for intraregional travel. However, intraregional travel will still dominate European tourist arrivals in 2020 at a ratio of almost 6 to 1, if 'not specified' is included with intraregional. By 2020, 564 million (almost 80%) of all arrivals in Europe will be from the European region.

Despite the Asian financial crisis restricting the growth of Asian tourism to Europe over the period 1995-2000, strong growth from this region is expected to resume in the next two decades, providing the East Asia and the Pacific region with the strongest annual growth rate of arrivals to Europe over the period 1995-2020. With a forecast number of 45 million arrivals, by 2020 the East Asia and the Pacific will have taken over from Americas as Europe's first long-haul source market.

Africa, South Asia and the Middle East also show annual growth rates above the global average, albeit from small bases. The Americas will join intraregional tourism in losing some of its global share of arrivals to the region. However, the number of American arrivals to Europe will still double to 44 million in 2020.

Table 2.1.4b WTO Tourism 2020 Vision: Forecast for Europe
International Tourist Arrivals to Europe by Tourist Generating Region (million)

	Base Year	Forecasts		Average Annual Growth Rate (%)	Market Share (%)	
	1995	2010	2020	1995-2020	1995	2020
Total	338.4	527.3	717.0	3.0	100	100
Africa	3.4	6.8	11.4	5.0	1.0	1.6
Americas	21.6	33.1	43.6	2.8	6.4	6.1
East Asia and the Pacific	12.5	23.0	45.4	5.3	3.7	6.3
Europe	275.4	427.1	564.3	2.9	81.4	78.7
Middle East	1.9	3.6	5.3	4.1	0.6	0.7
South Asia	0.8	1.6	2.7	4.8	0.2	0.4
Not specified	22.7	32.1	44.3	2.7	6.7	6.2
Intraregional	298.1	459.2	608.7	2.9	88.1	84.9
Long-Haul	40.3	68.1	108.3	4.0	11.9	15.1

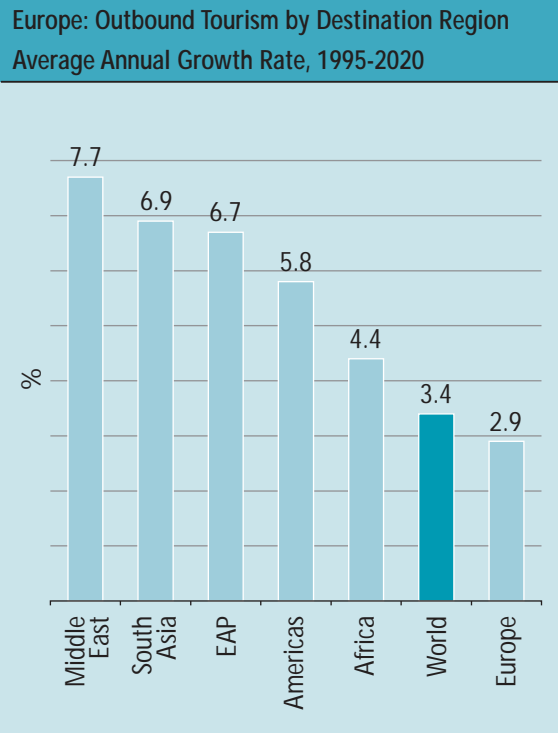
Source: World Tourism Organization (WTO)

(Actual data as in WTO database July 2000)

Outbound Tourism

The *Tourism 2020 Vision* study forecasts that there will be over 729 million outbound tourist arrivals generated from Europe in the year 2020. This represents an annual growth rate over the period 1995 to 2020 of 3.4 per cent, over half a percentage point below the global average of 4.1 per cent.

Whilst Europe will remain the world's largest tourist generating region by some considerable magnitude, it is losing its global market share. In 1995, around 55 per cent of all outbound tourists were from Europe. However, by 2020 this will decline to around 47 per cent due to the emerging importance of the developing world (especially East Asia and the Pacific) as tourist generating regions.



Although long-haul travel from Europe will grow at over double the rate of intraregional travel between 1995 and 2020, outbound travel from Europe to other European destinations (intraregional travel) will dominate total European tourist departures over the forecast period. In 1995, 12 per cent of all travel from Europe was long-haul. By 2020, this will increase to almost 23 per cent. The Middle East can expect to experience the highest growth rate of European arrivals (7.7 per cent a year over the forecast period). However, European arrivals to South Asia, East Asia and the Pacific, the Americas and Africa will also grow at above the overall European outbound rate.

Western Europe will remain the largest generating subregion within Europe over the forecast period, generating almost 338 million tourists by the year 2020. However, overall growth rate of the Western subregion will under-perform the European average slightly. The East Mediterranean subregion will show the largest growth rate of outbound tourists over the forecast period, with 4.7 per cent a year.

2.1.5 Middle East

The Middle East is likely to see its oil revenues decrease during the next 20 to 30 years, and with no other mineral resources to sell, many countries are turning to tourism, capitalising on their other natural assets, historic cultures and Islamic traditions.

There is a huge growth in religious tourism, and the publicity and promotion of these events (e.g. the Bethlehem 2000 project) are expected to be a major catalyst for a revival in religious tourism globally.

A significant deterrent to tourism in the Middle East is the image of some countries in the region characterised by low hygiene standards, tourist harassment, moderate transport safety records, ongoing inter-nation tensions and political upheavals. The Middle East region suffers from an image of border disputes, and will continue to do so whilst a fragile peace is in place.

However, there are moves towards increased co-operation. Israel, Jordan and Egypt launched their first ever joint campaign to promote their coastline as the Red Sea Riviera. The tourist boards hope tour operators will start to use the term Red Sea Riviera for the region in their brochures.

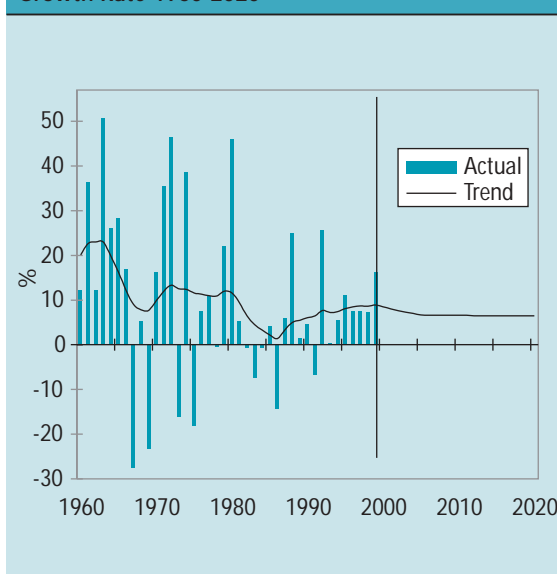
Inbound Tourism

There were 12.4 million international tourist arrivals in the Middle East in 1995, and these are expected to increase to 69 million by 2020. This represents an annual average growth rate of 7.1 per cent for the period 1995-2020, three percentage points above the global growth rate of 4.1 per cent (Table 2.1.5a). The overall share of arrivals to the Middle East region is expected to double over the forecast period from 2.2 per cent in 1995 to 4.4 per cent in 2020.

In the year 2020, it is expected that Egypt will remain the Middle East's number one destination reaching 17 million international arrivals. The next most visited destination will be Saudi Arabia with 12 million international tourist arrivals, followed by Dubai, Bahrain and Jordan, countries that are forecast to receive between 5 and 8 million international tourist arrivals in the year 2020. Oman, Lebanon and Syria are forecast to receive between 3 and 4 million international tourist arrivals by the year 2020 and Libya will reach the one million mark.

The highest growth rate for the 1995-2020 period is anticipated for Libya and Oman at 13 and 11 per cent a year respectively, both from relatively small bases. Lebanon is also

**International Tourist Arrivals in the Middle East
 Growth Rate 1960-2020**



expected to grow well above the region's average of 7.1 per cent. As a result they will all gain market share within the region. Egypt, growing at a rate of 7.4 per cent a year, will also still increase its market share somewhat and will receive a quarter of the regions total by 2020. The remaining destinations will show growth rates somewhat below the region's average. As a consequence, they face decreased market share, although in absolute terms all will see international tourist arrivals increase from almost threefold to more than fivefold.

	Actual	Forecasts		Market Share		Average Annual
	1995	2010	2020	1995	2020	Growth 1995-2020
Middle East	12,353	35,888	68,541	100	100	7.1
Egypt	2,872	8,693	17,100	23.2	24.9	7.4
Saudi Arabia	3,325	7,979	12,194	26.9	17.8	5.3
Dubai	1,601	4,354	7,928	13.0	11.6	6.6
Bahrain	1,396	3,797	7,470	11.3	10.9	6.9
Jordan	1,074	2,792	5,690	8.7	8.3	6.9
Oman	279	1,801	3,888	2.3	5.7	11.1
Lebanon	450	1,716	3,704	3.6	5.4	8.8
Syria	815	1,577	3,102	6.6	4.5	5.5
Libya	56	416	1,079	0.5	1.6	12.6
Yemen	61	107	159	0.5	0.2	3.9

Source: World Tourism Organization (WTO)

(Actual data as in WTO database July 2000)

Generating Regions

Long-haul travel to the Middle East is forecast to grow at 7.5 per cent a year between 1995-2020 as against 6.5 per cent for intraregional travel. This increase in long-haul reflects the worldwide trend towards increased long-haul travel. Between 1985 and 1995, the number of long-haul arrivals in the Middle East exceeded intraregional arrivals for the first time. By 2020, there will be 18 million more long-haul arrivals in the region than intraregional ones.

Although growth of long-haul tourism will outpace that of intraregional tourism, tourism between the Arab states will still grow at a rate of more than one-and-a half times that for all international tourism. The Middle East will record the second highest regional growth rate (the highest will be East Asia and the Pacific) for intraregional tourism between 1995 and 2020.

Whilst by 2020 over 25 million (37%) of all arrivals in the Middle East region will be from Middle Eastern countries, the strongest growth rates over the period 1995-2020 will be from Europe and South Asia (from a low base). In 2020, it is forecast that 22 million arrivals (32%) in the region will be from Europe, maintaining its position as the second most important generating region to the Middle East. Arrivals from East Asia and the Pacific and the Americas will also grow faster than the overall average for the Middle East.

Table 2.1.5b WTO Tourism 2020 Vision: Forecast for the Middle East

International Tourist Arrivals to the Middle East by Tourist Generating Region (million)

	Base Year	Forecasts		Average Annual Growth Rate (%)	Market Share (%)	
	1995	2010	2020	1995-2020	1995	2020
Total	12.4	35.9	68.5	7.1	100	100
Africa	1.3	3.3	6.0	6.5	10.1	8.8
Americas	0.6	1.8	3.6	7.5	4.8	5.3
East Asia and the Pacific	1.0	2.5	5.9	7.5	7.9	8.6
Europe	3.4	11.0	21.7	7.7	27.3	31.7
Middle East	5.2	14.0	25.1	6.5	42.2	36.5
South Asia	0.9	3.1	6.0	7.8	7.4	8.8
Not specified	0.0	0.1	0.2	8.0	0.2	0.3
Intraregional	5.2	14.1	25.2	6.5	42.4	36.8
Long-Haul	7.1	21.8	43.3	7.5	57.6	63.2

Source: World Tourism Organization (WTO)

(Actual data as in WTO database July 2000)

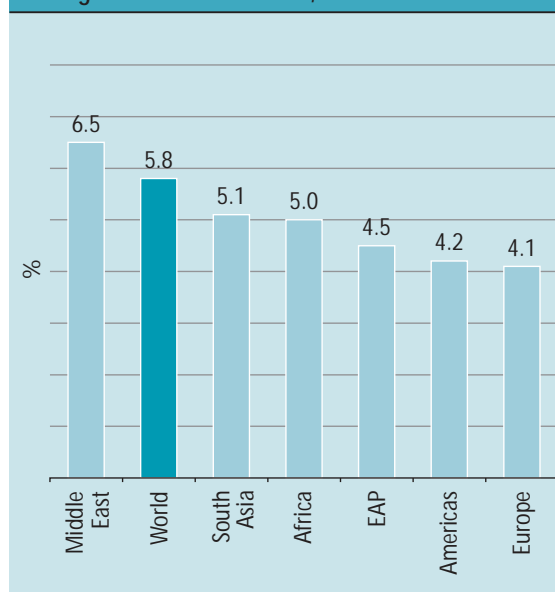
Outbound Tourism

The *Tourism 2020 Vision* study forecasts that there will be over 35 million outbound tourist arrivals generated from the Middle East in the year 2020. This represents an annual growth rate over the period 1995 to 2020 of 5.8 per cent, more than one-and-a-half percentage points above the global average of 4.1 per cent. The Middle East region will exhibit the third highest growth rate of all the regions worldwide.

Whilst the Middle East will remain the world's fifth largest tourist generating region over the period 1995-2020, it will gain some market share, increasing from 1.5 per cent in 1995 to 2.2 per cent in 2020.

Outbound travel from the Middle East to other Middle Eastern destinations (intraregional travel) will dominate total Middle East tourist departures over the forecast period. By 2020, over 25 million tourists will travel within the Middle East region. This will constitute over 71 per cent of all outbound travel.

**Middle East: Outbound Tourism by Destination Region
Average Annual Growth Rate, 1995-2020**



Intraregional travel from the Middle East will grow at over half-a-percentage point (6.5 per cent per year) above the overall rate of Middle East outbound travel between 1995 and 2020. As intraregional travel increases its market share of outbound tourism, long-haul travel will decrease, growing at only 4.4 per cent per year over the forecast period.

Europe and Africa will remain the preferred long-haul destination regions from the Middle East with 5.3 and 2.7 million arrivals respectively in the year 2020. However, due to the increasing importance of the intraregional tourism in the Middle East their market share has decreased between 1995 to 2020 (from 22% to 15% for Europe and from 9% to 8% in the case of Africa).

2.1.6 South Asia

A significant barrier to the growth of tourism in the South Asia region is the limited air access to, and within, the countries of the region. This is partly brought about by insufficient demand to enable commercial air service operation, and can be partly attributed to airport limitations.

There is an increase in regional collaboration, and a number of regionally-based initiatives exist, but few have been given the political and financial support to date to bring them to effective function. There are also a number of examples where South Asian governments have entered into agreements with countries outside the region to promote tourism between the countries e.g. India with South Africa and Greece, and Iran with Kenya to promote ecotourism.

A major growth market for South Asia is East Asia and the Pacific. The Asian financial crisis, however, posed a serious threat to the South Asia region. In total, it has been estimated that the Asian crisis signified a cost for South Asia of around 380,000 arrivals in the year 2000. Account, though, should be taken of the increase in intraregional tourist arrivals as a result of would-be South Asian tourists travelling to East Asia and the Pacific who switched back to an intraregional destination.

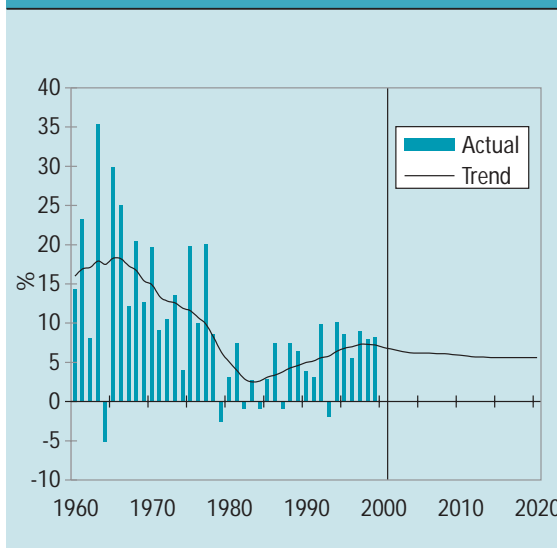
Despite significant improvement in the general environment for investment over the 1990s, investment conditions in the Indian hotel and tourism sectors are relatively attractive compared with countries in South-East and North-East Asia. The extent to which India –as the regional leader in tourism– is able to attract foreign investment will be a key determinant to the growth of tourism in South Asia.

Inbound Tourism

There were 4.2 million international tourist arrivals in South Asia in 1995, and these are expected to increase to almost 19 million by 2020. This represents an annual average growth rate of 6.2 per cent for the period 1995-2020, over 2 percentage points above the global growth rate of 4.1 per cent (Table 2.1.6a).

Thus, the overall share of arrivals in the South Asia region is expected to increase over the forecast period from 0.7 per cent in 1995 to 1.2 per cent in 2020.

**International Tourist Arrivals in South Asia
 Growth Rate 1960-2020**



By country, it is expected that India will remain South Asia's number one destination with almost 9 million international arrivals in the year 2020. The next most visited destination will be Iran with 3.4 million international tourist arrivals, followed by Nepal, Sri Lanka, Maldives and Pakistan, countries that are forecast to receive between 1 and 2 million international tourist arrivals in the year 2020.

The highest growth rate for the 1995-2020 period is anticipated for Iran at 8.4 per cent a year, with arrivals to increase sevenfold in the forecast period. As a result Iran's market share in the region's arrivals will increase considerably, from 11 to 18 per cent. Furthermore, Nepal is expected to grow at 7.0 per cent, increasing its market share from 8.7 to 10.5 per cent. Maldives is forecast to keep up with the region's average growth rate, while India will perform slightly below. The remaining destinations will show growth rates somewhat below the region's average. As a consequence they face decreased market share, although in absolute terms all will still more than double or triple numbers of international tourist arrivals.

**Table 2.1.6a WTO Tourism 2020 Vision: Inbound Tourism, Selected South Asia Destination Countries
 Forecasts of International Tourist Arrivals by Destination Country (000)**

	Actual	Forecasts		Market Share		Average Annual
	1995	2010	2020	1995	2020	Growth 1995-2020
South Asia	4,200	10,643	18,759	100	100	6.2
Bangladesh	156	255	415	3.7	2.2	4.0
India	2,124	5,089	8,900	50.6	47.4	5.9
Iran	452	1,926	3,362	10.8	17.9	8.4
Maldives	315	868	1,414	7.5	7.5	6.2
Nepal	363	1,067	1,973	8.7	10.5	7.0
Pakistan	378	697	1,248	9.0	6.7	4.9
Sri Lanka	403	725	1,426	9.6	7.6	5.2

Source: World Tourism Organization (WTO)

(Actual data as in WTO database July 2000)

Generating Regions

Long-haul travel to South Asia will grow at 6.7 per cent a year between 1995 - 2020 as against 4.0 per cent for intraregional travel. The strength of interregional travel to South Asia is highlighted in Table 2.1.6b which show the number and growth rates of international arrivals in the region by worldwide generating region. By 2020, 16 million (almost 85%) of all arrivals in South Asia will be interregional.

Of the long-haul generating regions, Africa (led by the Southern Africa subregion), the Americas and Europe (especially Central/Eastern Europe) will be the fastest growing for South Asia, though East Asia and the Pacific will show strong growth after its countries achieve economic recovery over the course of the next decade. Europe will represent more than half of the tourist arrivals in South Asia in the 2020.

Table 2.1.6b WTO Tourism 2020 Vision: Forecast for South Asia						
International Tourist Arrivals to South Asia by Tourist Generating Region (million)						
	Base Year	Forecasts		Average Annual Growth Rate (%)	Market Share (%)	
	1995	2010	2020	1995-2020	1995	2020
Total	4.2	10.6	18.8	6.2	100	100
Africa	0.1	0.3	0.7	8.0	2.6	3.9
Americas	0.4	1.2	2.2	7.0	9.7	11.8
East Asia and the Pacific	0.5	1.4	2.4	6.0	13.1	12.7
Europe	1.9	5.4	9.9	6.9	44.7	52.8
Middle East	0.2	0.4	0.7	5.1	4.5	3.5
South Asia	1.1	1.9	2.8	4.0	25.3	15.1
Not specified	0.0	0.0	0.0	6.6	0.1	0.1
Intraregional	1.1	1.9	2.9	4.0	25.4	15.2
Long-Haul	3.1	8.7	15.9	6.7	74.6	84.8

Source: World Tourism Organization (WTO)

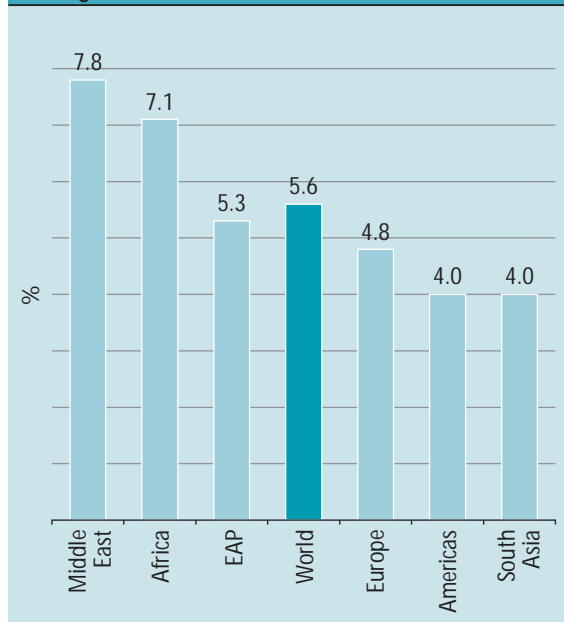
(Actual data as in WTO database July 2000)

Outbound Tourism

The *Tourism 2020 Vision* study forecasts that there will be almost 17 million outbound tourist arrivals generated from South Asia in the year 2020. This represents an annual growth rate over the period 1995 to 2020 of 5.6 per cent, one-and-a-half percentage points above the global average of 4.1 per cent. The South Asia region will exhibit the fourth highest growth rate of all the regions worldwide. Consequently, the South Asia region will gain market share of outbound tourists, growing from 0.8 per cent in 1995 to 1.1 per cent in 2020.

Unlike other WTO regions, outbound travel from South Asia to other South Asia destinations (intra-regional travel) will not dominate total regional tourist departures over the forecast period. Currently only a quarter of arrivals generated by South Asia are within the region itself. As long-haul outbound travel by the residents of South Asian countries will grow two percentage points faster than intraregional travel, by 2020 this share will even decrease to 17 per cent. By 2020, outbound arrivals in interregional destinations by South Asian residents will top 14 million, as against just 2.8 million arrivals in destinations within South Asia.

**South Asia: Outbound Tourism by Destination Region
 Average Annual Growth Rate 1995-2020**



The main receiving long-haul regions for South Asian tourists will continue to be the Middle East (36 per cent in 2020) and East Asia and the Pacific (26 per cent). The Middle East will achieve the highest growth rate reflecting the increasing volumes of worker, visiting friends and relatives (VFR), religious and business purpose flows from South Asia. Europe will follow as the third long-haul destination region receiving almost 16 per cent of total outbound tourism of South Asia in the year 2020.

2.2 Special Country Groupings

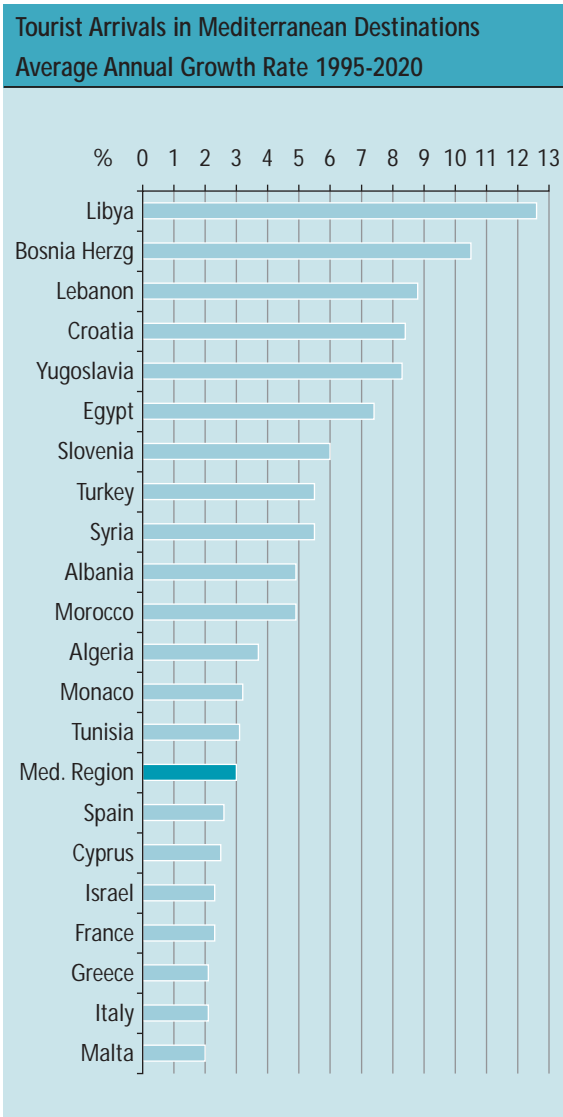
2.2.1 Mediterranean Forecasts

Of the 637 million international tourist arrivals worldwide in 1995, over 166 million (almost one third) visited the Mediterranean region. Over the period 1995 to 2020, it is expected that the average annual growth rate of tourist arrivals to the 21 countries bordering the Mediterranean Sea will be 3 per cent (Table 2.2.1). By 2020, this will account for 346 million arrivals, or approximately 22 per cent of all global arrivals. Therefore, despite its continued growth as the world's largest tourist receiving region, the Mediterranean's share of global tourism is expected to decrease over the next two decades.

The top three destinations in 2020 will be the same as the top three today, France, Spain and Italy. However, the strongest rates of growth among the Mediterranean destinations over the period 1995-2020 are likely to be achieved by two groups of countries and territories: those in the rapid-growth phase of development (i.e. Turkey and Egypt); and those destinations seeking to rebuild their tourism sectors from one form or another of disruption in recent years (e.g. the new countries of the former Yugoslavia, Lebanon and, in the mid- or long-term, Libya).

By contrast, only one of the "big 5" will see significant growth with Spain, Italy, Greece and France all likely to record growth rates of between 2 and 3 per cent (below the Mediterranean average). However, Turkey will record an above the Mediterranean average with an annual growth rate of 5.5 per cent. Collectively, these five countries' share of Mediterranean arrivals will decline from 88 per cent in 1995 to 80 per cent by 2020.

The Middle East destinations of Egypt, Lebanon, Syria and Libya (from a low base) are forecast to grow at 7.4, 8.8, 5.5 and 12.6 per cent per year over the period 1995-2020, all well above the overall growth rate for the Mediterranean region. The North African countries of Morocco, Tunisia and Algeria will also record growth rates above the average for the Mediterranean region.



**Table 2.2.1 Tourism 2020 Vision: Forecasts of International Tourist Arrivals
in Mediterranean Destinations (000)**

	Actual	Forecasts		Market Share		Average Annual
	1995	2010	2020	1995	2020	Growth 1995-2020
Total	166,562	268,775	345,974	100	100	3.0
Albania	40	51	133	0.02	0.04	4.9
Algeria	520	1,009	1,304	0.3	0.4	3.7
Bosnia Herzg	37	248	444	0.02	0.1	10.5
Croatia	1,324	7,454	10,017	0.8	2.9	8.4
Cyprus	2,100	3,041	3,893	1.3	1.1	2.5
Egypt	2,872	8,693	17,100	1.7	4.9	7.4
France	60,033	88,237	106,093	36.0	30.7	2.3
Greece	10,130	14,315	17,111	6.1	4.9	2.1
Israel	2,215	3,055	3,910	1.3	1.1	2.3
Italy	31,052	43,881	52,451	18.6	15.2	2.1
Lebanon	450	1,716	3,704	0.3	1.1	8.8
Libya	56	416	1,079	0.03	0.3	12.6
Malta	1,116	1,502	1,831	0.7	0.5	2.0
Monaco	233	381	512	0.1	0.1	3.2
Morocco	2,602	5,465	8,692	1.6	2.5	4.9
Slovenia	732	1,920	3,128	0.4	0.9	6.0
Spain	38,803	61,798	73,867	23.3	21.4	2.6
Syria	815	1,577	3,102	0.5	0.9	5.5
Tunisia	4,120	6,305	8,916	2.5	2.6	3.1
Turkey	7,083	17,068	27,017	4.3	7.8	5.5
Yugoslavia	228	643	1,669	0.1	0.5	8.3

Source: World Tourism Organization (WTO)

(Actual data as in WTO database July 2000)

2.2.2 Indian Ocean Forecasts

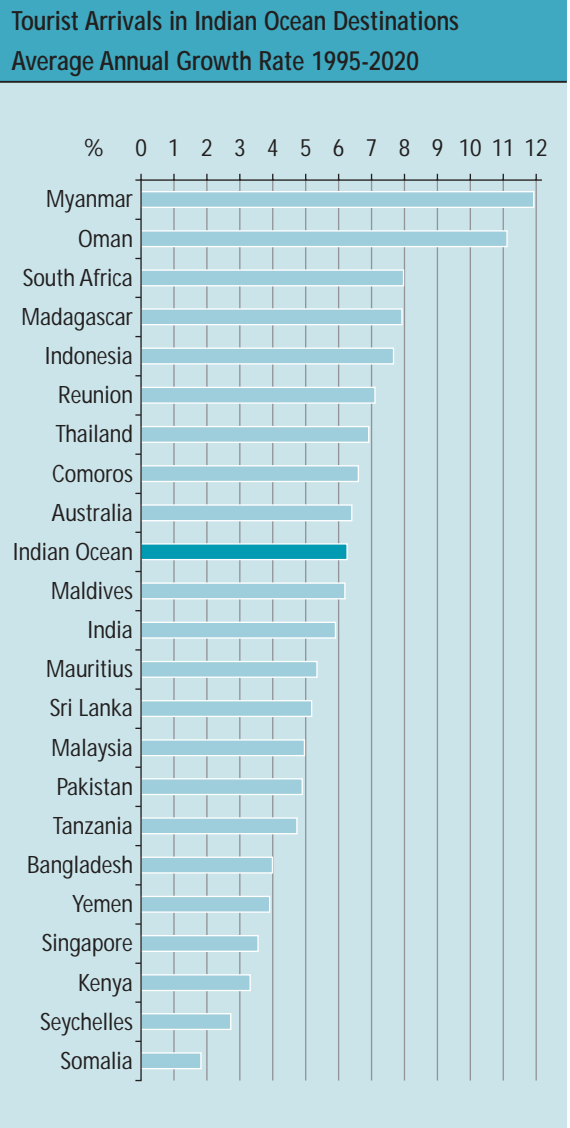
Of the 1995 aggregate of 39.4 million international tourist arrivals in the 22 countries in, or with coastlines bordering the Indian Ocean, approximately 45 per cent are classified as coastal tourists, i.e. 17.8 million.

The leading destinations for coastal tourists are Thailand, Indonesia, Malaysia, South Africa, and Australia (all of which also have substantial volumes for non-coastal forms of tourism) with the island countries of the Indian Ocean, where tourism is predominantly (or totally) coastal tourism, having much lower volumes (i.e. Mauritius, Maldives, Reunion, Seychelles).

Indian Ocean tourism grew at an average annual rate of 7.4 per cent between 1990 and 1995, indicating a strong boost in market share globally (world arrivals rose by 4.3 per cent a year over the same period) and related to other major oceanic groupings (i.e. the Mediterranean countries recorded an annual growth rate in arrivals of 2.0 per cent between 1990 and 1995, while the corresponding rate of increase for the Caribbean was 4.3 per cent a year).

The strongest performers between 1990 and 1995 were newly-emerging tourism destinations, albeit from a low base volume (i.e. Myanmar 41 per cent per year, Comoros 24 per cent per year, and Oman 13 per cent per year). However, strong growth was also achieved in post-apartheid South Africa (up 34 per cent per year), Indonesia (15 per cent per year), Tanzania (13 per cent per year), Australia (11 per cent per year), and Maldives (10 per cent per year). In 2 of the 22 countries (Pakistan and Somalia) the volume of arrivals in 1995 was below the 1990 level.

The WTO's Tourism 2020 Vision forecasts see a continued higher-than-average growth in Indian Ocean tourism, with an annual growth rate of 6.3 per cent over the period 1995-2020. By 2020, the 22 Indian Ocean countries will receive over 179 million international tourist arrivals.



In 1990, the Indian Ocean countries accounted for six per cent of international tourist arrivals worldwide: by 1995 this share had risen to seven per cent, and a further progressive rise is anticipated over the period to 2020 when one-in-every-nine (or over 11%) of tourists will be to an Indian Ocean country.

The strongest rates of growth among the Indian Ocean countries over the period 1995-2020 are likely to be achieved by three groups of countries: those in the rapid growth phase of development (i.e. South Africa, Oman and Madagascar); those seeking to rebuild their tourism sectors from one form or another of disruption in recent years, and for which there is pent-up demand (e.g. Myanmar); and those with successful tourism sectors with highly positive images (e.g. Australia, Mauritius and Maldives). Each of these three categories is likely to be characterised over the forecast period by higher rates of growth in earlier years than in later years as the destinations mature and, in the case of some of the island destinations, carrying capacity thresholds are neared.

Table 2.2.2 Tourism 2020 Vision: Forecasts of International Tourist Arrivals in Indian Ocean Destinations (000)

	Actual	Forecasts		Market Share		Average Annual
	1995	2010	2020	1995	2020	Growth 1995-2020
Total	39,350	91,544	179,249	100	100	6.3
Australia	3,726	9,134	17,553	9.5	9.8	6.4
Bangladesh	156	255	415	0.4	0.2	4.0
Comoros	23	58	114	0.1	0.1	6.6
India	2,124	5,089	8,900	5.4	5.0	5.9
Indonesia	4,324	11,957	27,385	11.0	15.3	7.7
Kenya	896	1,402	2,024	2.3	1.1	3.3
Madagascar	75	310	505	0.2	0.3	7.9
Malaysia	7,469	13,095	25,046	19.0	14.0	5.0
Maldives	315	868	1,414	0.8	0.8	6.2
Mauritius	422	1,046	1,548	1.1	0.9	5.3
Myanmar	117	904	1,952	0.3	1.1	11.9
Oman	279	1,801	3,888	0.7	2.2	11.1
Pakistan	378	697	1,248	1.0	0.7	4.9
Reunion	304	859	1,689	0.8	0.9	7.1
Seychelles	121	185	237	0.3	0.1	2.7
Singapore	6,422	9,617	15,356	16.3	8.6	3.5
Somalia	10	12	16	0.03	0.01	1.8
South Africa	4,488	15,267	30,523	11.4	17.0	8.0
Sri Lanka	403	725	1,426	1.0	0.8	5.2
Tanzania	285	626	905	0.7	0.5	4.7
Thailand	6,952	17,532	36,948	17.7	20.6	6.9
Yemen	61	107	159	0.2	0.1	3.9

Source: World Tourism Organization (WTO)

(Actual data as in WTO database July 2000)

3 Key Developmental Factors

3.1 Destination Developments

Implications of Demand for Supply

- The growing demand by tourists to visit some of the world's "honeypots" is causing many destinations to consider methods to manage visitors more effectively, for their own enjoyment and also for the protection of the product itself. The popularity of national parks in the United Kingdom and the United States has led to the consideration of a ban on motor vehicles entering some of the parks. No-go areas or visitor cordons have also been experimented with in various European countries. During peak months, Florence insists that coaches pre-book if they want to visit the centre of the town. Time-controlled ticketing for attractions has also been implemented at many key European attractions, and certain ones have been declared off-limits to tourists, such as Stonehenge in the UK.
- The pressure of demand on destinations is not limited to the traditional holiday destinations. The number of climbers attempting the ascent of Everest is on the increase, with the biggest growth segment being what has been termed "the mid-life crisis brigade". They are usually men in a mid-life crisis who feel they have to reaffirm themselves. A large proportion are from the United States, and despite the occasional accidents that occur, the demand for trips up the mountain has accelerated.

Time Efficient Product Development

- An increasing proportion of the population of the main tourist generating countries are finding less time for travel, and consequently are in a "time poor - money rich" situation. The outcome of this trend is an increasing number of products that offer the traveller the maximum thrills in the minimum time. Theme parks, including activity centres (such as Centerparcs) are increasing in popularity, as are cruise holidays where the consumer experiences a large number of destinations and attractions in a short period of time. The opening of Disney's Animal Kingdom provides a good example of a theme park offering many of the attractions of an African safari, without having to travel to Africa to experience it.

Pollution and Politics Hitting Demand

- A number of different types of pollution have, in recent years, affected the flow of tourists around the world. The forest fires in Indonesia, on the islands of Sumatra and Borneo, covered a large area of Asia, including Singapore and parts of Malaysia, with a dense smog blocking out the sun. On the opposite side of the globe, Brazil has been experiencing similar problems,

although in an area (Paraiba) affecting fewer tourists. Recent studies indicate that remote islands such as those in the South Pacific are also being affected by air pollution that has been generated many thousands of miles away, such as in America or Australia. Satellites are now capable of detecting such pollution, but they are also being used to monitor environmental changes, predict the consequences, and determine how to cope with them.

- As rain forests disappear and evidence of global warming increases, it is becoming ever more difficult to ignore man's impact on nature and its impact on us. At this point, the question is not whether we will change our industries and lifestyles to accommodate the environment, but how radically we must change, how quickly we must act, and how much it will cost us. This will not be an easy transition. As the United States continues to resist changes that could slow down its economy and Third World lands assert their right to the same energy-consuming, polluting luxuries the West has long enjoyed, the controversy over environmental issues can only grow in the years to come.
- Ethical issues will become an increasing factor for many people when booking their holidays in the future. Whilst the issue of limiting damage to the environment from tourism is already recognised by the tourism industry through the development of the eco-tourism niche, consumers are also becoming more aware of political issues of places they are travelling to. Campaign groups will increasingly play a role in raising the awareness of destinations which they say tourists should re-consider travelling to due to human rights abuses and other questionable government policies and actions. Myanmar (Burma) and Bali are two destinations to be put under the spotlight recently, and some operators have pulled out of these countries due to pressure from campaign groups.

Resource Limitations in Meeting Demand

- Water is becoming a scarce resource in many countries of the world, and is likely to have serious implications for tourism in North Africa, the Middle East and South Asia in the next 20 years. By 2020, many countries in these regions are forecast to be in the UN's "high water stress" category. Conflict could occur where countries share water resources, such as the River Nile or River Jordan. The drying out of rivers could also affect the environment (and tourism) in areas where swamplands and deltas have been designated areas of outstanding natural beauty.
- Certain tourism resorts and areas are running the risk of, or have already fallen victim to, over development, and subsequent rejection by tourists. The southern coast of Spain has had to upgrade its product significantly in many areas to attract tourists back. Goa, on the West Coast of India is being threatened in a similar way by being in danger of losing its unique identity through the perceived over development of its coastline.
- The purchase of second homes, often used as holiday homes, is on the increase and as the number of non-indigenous purchases increase in several countries, racial and social tensions will become more common. Already there are calls for a ban on house sales in County Clare, Ireland, to anyone other than those born in the country or whose parents have been resident for at least 10 years.

Frontier Formality Withdrawal

- The Schengen agreement has abolished frontier controls between European countries, allowing people to travel without passports or border checks. It came into force in March 1995, with seven countries being included, although this has now expanded to fifteen: Austria, Belgium, France, Germany, Greece, Italy, Luxembourg, the Netherlands, Portugal, Spain and since 25 March 2001, Denmark, Finland, Iceland, Norway and Sweden.

Writing Off Third World Debt

- In the Millennium year the world wrote off more than US\$ 100 billion of Third World debt under the "highly indebted poor countries" (HIPC) initiative. This amounts to more than two-thirds of the debt of the poorest countries in the world, and is part of a shift in policy by the World Bank and IMF to help reduce poverty. The IMF, which is contributing about US\$ 2 billion, has found ways to meet its part of the contribution to the scheme from its own resources, including a planned sell-off of gold stocks. Finance ministers from the G7 are also signalling a shift in strategy by the international financial institutions to give more weight to poverty when they draw up their policies. This debt relief will enable countries such as Mozambique, Malawi and Bolivia to invest in tourism and develop their tourism infrastructure, and consequently benefit from the foreign exchange the industry will generate.
- The gap between the richest and poorest countries in the world is continuing to increase. Average income in the world's five richest countries is 74 times the level in the poorest five, the widest the inequality gap has ever been. The Internet is helping make this inequality greater than ever. Only in the richest countries is Internet access widespread.

Euro: the Single Currency

- There is widespread conviction that the euro will be good for tourism. The forthcoming adoption of the Single Currency is therefore viewed by travel and tourism circles not as a revolution perhaps, but as a positive step forward. The first beneficiary of the euro will be the consumer. Three benefits have been identified:
 - simplicity: the tourist will need to carry only one currency;
 - transparency: the tourist will be familiar with the purchasing-power of the euro and will be able to compare prices easily from country to country;
 - economy: the tourist will economise on all those costs entailed in changing money, not only commission and general exchange costs but the time spent finding a bank to change their money.

- For the suppliers, the prevailing low rates of interest existing in the converging economies of the euro zone should offer good opportunities for investment. In fact, given the direct links between interest levels and project profitability, tourism enterprises should be taking the opportunity to invest in new plants or in renovation and modernisation. The single market may also induce some mergers or voluntary association and co-operation between (mostly small) enterprises. Also, because of the transparency of prices in the euro zone, some domestic tourism offers will appear rather expensive to the consumer who might prefer to travel abroad. Domestic suppliers may need to look abroad for their business, possibly by niche marketing.

Safety

- The importance of health within countries and resorts is crucial. The persistence of deficient conditions in hygiene matters has resulted in destinations being declared "unhealthy" on some occasions, and have not been visited by tourists temporarily. Outbreaks of disease have a temporary impact on tourists travelling to worldwide destinations, but the longer term damage to tourism would be caused if a disease was actually transmitted from its origin around the world through air travel.
- The safety of air traffic control systems is certain to play a major part in overall aircraft safety in the coming years. With the large growth in air travel, many air traffic control systems, even in the US, are struggling to cope. However, with the ATC systems of some countries particularly under scrutiny recently, with threats to the countries concerned that if their airspace is designated "critically deficient" all air transport into and out of the country will be suspended: an implication that goes way beyond that of tourism.
- Air traffic congestion is also becoming a serious problem. With the increasing levels of traffic in the skies, fears have been raised about the potential increase in the number of air accidents.
- Tourism will not flourish in destinations in civil turmoil, at war, or where tourists' health or security is perceived to be under threat. Many countries at certain moments in time run the risk facing political or criminal motivated violence, such as hijacking, bomb attacks, riots or disorder. Tourist kidnappings appear to be on the increase with incidents worldwide doubling in the last five years. Terrorist groups are becoming more aware that action directed against tourists makes good media coverage for their cause by gaining international attention.

3.2 Private Sector Structure, Strategies and Practices

- The process of concentration of power within the sub-sectors which make up the travel and tourism sector is continuing apace. Though there now exist more than 500 airline alliances, with around 60 of these involving equity holding, five groupings dominate (i.e. One-world, Star Alliance, Skyteam, Qualiflyer and the KLM-NorthWest alliance). While regulatory intervention or corporate incompatibility may thwart their ambitions, if the major airlines achieve their objectives, most passenger flights will take place on one of just three airline groups before 2010. The danger for travellers will be if the three groups unofficially divide up the world between them, creating such strong spheres of influence that competitors dare not challenge them and, in consequence, fares rise.
- The accommodation sub-sector is following the same trend with the consolidation of hotel groups, e.g. Starwood's purchase of both Westin Hotels and Sheraton. The European tour-operating sub-sector is also experiencing a centralisation of power with the leading German and British companies pursuing expansion strategies through the acquisition of tour operators in other European countries.
- In addition to horizontal and vertical integration, many travel and tourism companies are utilising a diagonal integration strategy, whereby they establish operations to offer products and services which tourists commonly purchase but which are not directly part of the tourism product, e.g. insurance, currency, luggage and other travel goods.
- The facilitation of booking travel and tourism through electronic technology is leading more suppliers to seek to increase their direct sales. While household access to the Internet in most countries is not yet widespread, penetration levels of 50 per cent are widely predicted by 2010.
- Airlines, hotel groups, rail networks, tour operators, car rental firms - all are examining the reduction of the levels of standard commission paid to travel agents, arguing that the speed and ease of bookings through their computer reservation systems do not warrant retention of the original rates which reflected more time input on the agents' part. European national carriers have reduced basic agency commission from 9 per cent to 7.5 per cent and 7 per cent respectively for international and domestic ticket sales. Both German and British tour operators are considering changing their standard 10 per cent (or higher in the case of Germany) rates and introducing systems related to productivity, or a performance reward scheme based on sales targets (similar to that operated by the airlines). Some suppliers -like the Hyatt International Corporation hotel chain- are limiting agency override commissions to electronic bookings (i.e. those which do not impose a human servicing cost on the supplier).

- By expanding their geographic operations as well as the range of products and services offered, the major travel and tourism global groupings will increasingly be able to meet the needs of a greater proportion of the travelling public (and the many market segments and origin-destination routes which make up the total travel and tourism markets). By utilising their economies of both scale and scope, they will be able to provide these at value-for-money price levels which smaller (or less extensive) competitors cannot match. With a powerful hold on their markets achieved, it remains to be seen if these groups will then exploit this control by moving prices up or whether consumer and destination interest groups will exert sufficient influence on the mega-suppliers to maintain rates at levels which stimulate continued strong demand growth.
- European air deregulation has spawned an influx of new, no-frills, low-cost airlines (e.g. Ryanair, EasyJet, Go and Buzz). To date, their impact has been limited principally because they operate from secondary airports, being unable to obtain landing slots at major airports; however, they are the fastest growing segment in the European aviation market. Their success has also forced major carriers to enter into the low-fares travel market segment. British Airways and KLM (Go and Buzz respectively) have both launched low cost carriers. The independent airlines fear that the major carriers will compete "unfairly" by cross subsidising from their core operations.
- In the United States, where low-cost carriers have been around for some 30 years, they account for 10 per cent of domestic traffic. In Europe, the low-cost carriers presently only account for some two per cent. The growth of the low-cost sector is expanding the tourism market in Europe, especially the independent traveller-short break market. There will also be an emergence of low-cost short break packages that will combine flights on low-cost carriers with budget accommodation. This will generate a whole new segment within the short break/city break market, and will principally be marketed to the 18 to 26 year-old age group.
- The privatisation of the world's national airlines continues, with a clear tendency, as part of their global network development strategy, for the major carriers to take share holdings in (or acquire) the privatising airlines. Privatisation can be seen to be fuelling the spread of globalisation. The upcoming privatisation of South African Airways is attracting interest from inter alia Continental Airlines (through its association with KLM and Northwest Airlines), British Airways and Singapore Airlines/Lufthansa in partnership.
- The key to aircraft yield management is having the right type of aircraft for given routes (i.e. in respect of capacity - passenger and cargo, fuel and other features of performance). New aircraft types are being developed - both small and large- to meet this criterion, enabling a further real reduction in airfares to be possible on operational efficiency grounds.

- There is a marked divergence of opinion between the two major aircraft manufacturers - Boeing and Airbus - on the size of the market over the next twenty years for large (i.e. over 500 seats) aircraft. Airbus has recently raised its forecast for demand of the A3XX 555 to 656 seater Super-Jumbo to 1,500 aircraft over the next 20 years. However, Boeing, who has stopped work on its own Super Jumbo project, puts the market at 360 planes. Russian aircraft designers, Sukhoi, report plans for a 1,000 passenger super jumbo jet; the Japanese Government is developing a supersonic passenger plane, three times the size of Concorde, which flying at Mach 2.4 could reduce travel time between Tokyo and Europe to around five hours. McDonnell Douglas (prior to its acquisition by Boeing) was examining a flying wing plane carrying up to 800 passengers.
- For the project to be viable, Airbus says that the A3XX will have to be 10 per cent more cost effective than existing Jumbo jets and achieve a 20 per cent return. Several airlines, including British Airways have been advising Airbus on the new aircraft's design, despite its decision to reduce its fleet of Jumbos and bring smaller aircraft into the fleet.
- Other transport technology developments which will all serve to foster more travel and tourism of one kind or another include: space shuttle transport, including for continental routes such as between Sydney and Europe which could be covered in two hours; the proposed 500 kph levitation train which will operate initially on a 500 km route between Hamburg and Berlin and will constitute a growing threat to air travel on European routes; the automated, rechargeable electric car that will change motorists' attitudes and behaviour, as will the reported plan to develop a flying car - the Aircar - if it comes to fruition; and finally, cruise lines are becoming ever larger -details in a later section- with the grandest concept being the Saltire "floating city" project with capacity for 7,500.

3.3 Marketing Factors

- Declining population growth rates in the industrialised countries have two important implications for tourism: first, the population of developing countries will comprise a growing proportion of the world total; and, second, the numbers of older persons in industrialised countries will constitute a higher percentage of the total population in such countries. While the first of these factors may not be strongly positive for international tourism because the ability of the developing countries to generate sufficient GDP for their populations to engage in discretionary travel is unlikely to grow sufficiently, the growing volumes of over 50s in Europe, North America and Japan will be largely positive for foreign travel, in particular to long-haul destinations and for cultural purposes. The direct consequence of this ageing pattern will be that seniors will be responsible for a bigger share of all holiday spending. Already by the year 2000, the over 50's segment accounts for around a third or over. It will also have a notable impact on the type of holidays taken and destinations chosen, for instance the volume of beach holidays taken is likely to fall markedly. Even the threat of a raise of retirement age, in response to the imbalance between the working to non-working population ratios and the implications for the public purse, may do little to slow down the rate of growth and level of travel by seniors.
- As the balance of the population of all the developed countries gets older, the type of holidays people take will change. The holiday market is becoming much more segmented. The family holiday remains, but the growth will be in holidays for the retired, and for single people. Parallel to this change in demography is a change in taste. Holidays are becoming more specialised, and increasingly carry with them some kind of educational or cultural experience. People are going on holiday to learn something. That may be an activity such as skiing, or it may be a skill, such as a foreign language. For some people, a holiday, instead of being a form of consumption, is becoming an investment – investment in themselves. Consequently, the barrier between leisure and education will blur to such an extent that it will virtually disappear.
- There are approximately 50 million people in Europe between the ages of 15 and 24. Another 30 million are between 25 and 29. The under 30s represent about 22 per cent of the European population. They have grown up with computers, mass media, and advanced telecommunications. As a result, their values often differ sharply from those of their baby-boom parents. They will present unique and difficult challenges for both marketers and employers in the years ahead. The 20 to 35 age group is typically computer literate, with more degrees and buying more books than their baby-boom parents. Throughout the world they are starting new businesses at an unprecedented rate. They are extremely sceptical of all claims, and especially those of large institutions, whether in politics or business. Compared with the baby-boom generation, they can be a marketer's nightmare.

Marketing factors to be taken into account in the near future:

- new technologies revolution
- change in demography
- holidays more specialised
- computer literate generations
- pressures in job security; “time poor – money rich” people
- increasing levels of stress
- change in work patterns and practices
- increased single persons
- increasing service industry jobs

- A WTO study in leisure time (*Changes in Leisure Time: The Impact of Tourism*, WTO 1999), complementary to the *Tourism 2020 Vision* project, finds that pressures on job security are growing in the industrialised world to the extent that employees are increasingly voluntarily working longer hours and foregoing some of their paid leave entitlement. This leads to growing difficulty in scheduling leave periods, particularly for two-income households. The implications of this growth of “time poor - money rich” people is noted earlier in respect of destination product development. For some, the key will be in the promotion of leisure activities which maximise their available time (e.g. short break holidays, theme parks, cruise holidays); for others the release from their job pressures will be complete relaxation without the need to make any decision or engage in exacting activity - a scenario which augurs well for the further growth of all-inclusive resort holidays.
- Time is fast becoming the most precious of all non-renewable resources on earth. In a world of high technology where travelling more than 1,500 kilometres is a normal weekly commute for many people, it is the case that even if time spent at work has not grown, it can feel that way. Surveys in America show that on average people are working less than they did 30 years ago. However, these surveys also show that all the free time gained has been swallowed up in extra television watching, and also the increased pace of life makes everything seem rushed. It is possible to download something from the Internet 5,000 times faster today than was possible five years ago. Not everything is speeding up however, cars and planes do not go much faster than they did 20 years ago. However, what has changed is that there is less “dead time” between things. Event and experience happen closer together. Consequently, people will suffer increasing levels of stress, and the number of women remaining childless will increase. Stressed-out executives will want to use the services of oxygen bars where they can get invigorating shots of pure air and will also seek solitude from faxes, e-mail and the internet at resorts where they can unwind.
- Work patterns and practices will undergo significant change, with less routine attendance at a central place of work and more working from a fully equipped electronic home office. This will result in a blurring of the distinction between work and leisure. In consequence, people may work less hours but will be in communications contact with their business colleagues/partners for at least a part of almost every day. This will lead to the development of part-work/part-holiday breaks with destinations and accommodation selected which offer modern communications networks.
- Despite current trends in many developed countries of increased single person households (the British Government estimates that 4.4 million new homes will be required by 2016) there is a parallel trend which shows an increase in multigenerational households. More of us will start grouping together in larger households as disposable incomes stagnate or fall, life expectancy increases and concerns grow about the costs of residential care and child support. At the same time, growing employee flexibility and mobility, increased home working and the development of “cyber schooling” via the Internet will increase our focus on the home.

- The service industries will be a major source of employment in the next decade, and will be the fastest growing employment sector during this period. Anything that is service-oriented will be in demand, whether it is for gardeners, cleaners, nannies or somebody to walk the dog. Service industry jobs will not only offer greater convenience to consumers, they will also provide human interaction. Personal trainers, silver service waiting staff and party organisers will be in demand. As work becomes an exercise in cyberspace, it is jobs which provide human contact which will grow the fastest.
- Technology and communications are rapidly changing the way we live. New discoveries in science increase at an exponential rate, while consumer products based upon them proliferate even more rapidly. Within a few years new technologies will create entire new industries, while the industries they replace will wither and disappear. As a result, members of the generation now entering the labour force can expect to have an average of five entirely separate careers before their working days are over. All our knowledge today will just be one per cent of the knowledge available to us in 2050.
- Electronic technology will revolutionise the way we live in the next decade or so. In travel, the most important developments seem likely to be the following ones. Some of them are already a normal practice in some countries. It is sure that their use will become more generalised in the next decades.
 - Smart Cards will enable travellers to dispense with their wallets and travel documents (tickets, health certificates, passports etc). All this information will be contained on a single Smart Card. It will also be possible to "charge" Smart Cards with cash from a personal bank account. The card can then be used for making purchases in a similar way to a credit card. However, the advantage is that it will not be necessary to check with the credit card company to determine the credit available, as all this information will be stored on the Smart Card. Consequently, even small purchases (such as a drink at a bar) can be made. This will be the age of the e-purse.
 - Destination loyalty schemes where the user gets discounts for using the card at a destination and, in return, the destination gains valuable marketing information about its customers.
 - Internet video telephony whereby carriers can "test drive" a prospective holiday by viewing current pictures through cameras placed in hotels, clubs, restaurants, holiday supermarkets, and other sites in the destination and transmitted via the Internet.
 - Intelligent agent computer programmes which are a combination of pre-entered information (e.g. likes and dislikes in respect of holidays) and observed behaviours in the use of on-line booking patterns to make suggestions on possible options for the user, thus saving time in "surfing" the Internet.
 - CD ROMs are likely to be increasingly used as electronic brochures, saving time in the inspection of paper brochures. These are likely to be sponsored by both tour operators and destinations.

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4 Profiles of Market Segments

This chapter covers profiles for the ten market segments selected by the WTO as representing the most important and/or dynamic over the period of the study. For each subject segment information is presented on a comparable action-oriented format on:

- Working definitions;
- Estimates of magnitude;
- Characteristics of demand and supply;
- Growth prospects; and
- Promotional guidelines for NTAs.

The chapter is structured in ten sub-sections corresponding to the chosen segments, i.e. sun and beach tourism, sports tourism, adventure tourism, nature-based tourism, cultural tourism, urban tourism, rural tourism, cruises, theme parks, and meetings and conference tourism.

10 "Hot" Market Segments:

1. Sun and Beach Tourism
2. Sports Tourism
3. Adventure Tourism
4. Nature-Based Tourism
5. Cultural Tourism
6. Urban Tourism
7. Rural Tourism
8. Cruises
9. Theme Parks
10. Meetings and Conference Tourism

4.1 Sun and Beach Tourism

4.1.1 Short-Haul versus Long-haul

There are two large volume discretionary tourist markets: **resort-based** (coastal and inland points of attraction, mountains and deserts, and at key vantage points for viewing wildlife) and **general interest** circuit touring.

Within these two broad groups, beach resort-based holidays are by far the largest. Coastal tourism in the Mediterranean region alone is calculated by WTO at just under 100 million foreign tourist arrivals a year (with Spain, Italy, Greece, France and Turkey collectively accounting for 85 per cent of the total volume). Traditional, short-haul beach resort areas are, however, under competitive pressure as never before. The Caribbean and Hawaii (for North American Tourists), the Mediterranean (for European tourists), and Guam and Hawaii (for Japanese tourists) are approaching the mature/saturation stage of the product life cycle. More tourists from close-by generating countries are perceiving the large and long-established beach resort destinations as providing tired and jaded products; in response, these tourists are increasingly looking further afield to find "exotic" beach holidays.

The European coastal tourist, for example, is switching from Mediterranean resorts to resorts outside Europe (with East Asia and the Pacific, and the Americas being the main “winners”). Within the Mediterranean there will be variations: European Mediterranean countries are mature destinations, on the other hand the Mediterranean destinations of North Africa and the Middle East are faring better (though their performance is subject to fluctuations and uncertainty as a result of continuing failure to conclude the Middle East tensions with a lasting peace settlement and various other political and social problems).

The coastal resort tourism market among Europeans can be sub-divided as follows:

Table 4.1.1 Sub-Division of the Coastal Resort Tourism Market Among Europeans

Scale	Product	Segments	Destinations	Growth Prospects
Large	Concentrated resort development	All – but especially young and families. Budget – mid price	European Mediterranean	Moderate
Large	Concentrated resort development	All – but especially young and families. Budget – mid price	US – Florida	Good
Mid	Mix of concentrated and small scale development	All – but especially couples, and less emphasis on families. Budget – mid price	North Africa and Middle East, Mediterranean	Good
Mid	Mix of concentrated and small scale development	Couples without children – 20s to 60 s. Mid-to-high price	Long-haul ex Europe – Caribbean, Indian Ocean, Asian destinations	Strong

The Europe demand for long-haul resort tourism is between 10 to 12 million holidays a year, and growing rapidly; by 2010 it is likely to have grown to between 25-30 million. This represents a growth rate of around 6.5 to 7.0 per cent a year. By 2010, Europeans will take at least one long-haul beach holiday for every six Mediterranean beach holidays (i.e. 25 million compared with 150 million), the latter category increasing by only 2.7 per cent a year over the period.

The strongest rates of growth among Mediterranean countries over the period 1995-2020 is likely to be achieved by two groups of countries: those in the rapid growth phase of development (i.e. Egypt, Israel); and those countries seeking to rebuild their tourism sectors from one form or another of disruption in recent years (e.g. the new countries of former Yugoslavia, Lebanon and, in the mid or long term, Albania, Algeria, and Libya could fit into this category).

Another branch of beach tourism which produces small volumes of upmarket, high spending tourists is “boutique” resort tourism. This is targeted at tourists with an interest in the destination over and above the immediate environs of the resort. All Mediterranean countries – even those like Spain, the principal exponent of large scale, high rise resort tourism – offer these types of facilities at quieter, less developed locations catering for a different type of tourist. In Spain’s case, it represents a minor part of the coastal tourism product; for other countries it constitutes the central focus of it. Even if only five per cent of the total Mediterranean coastal tourist market represents potential for this style of resort, it still constitutes a potential market segment of 5 million tourists (and more than 50 million nights) to aim for.

While the case study above relates to Europe, the same trend towards taking coastal resort-based holidays further afield can be expected in respect of North Americans (i.e. to the South Pacific, South-East Asia, South America) though perhaps less so among the Japanese as they already typically travel six to ten hours to their beach destinations (i.e. excluding Guam and Saipan).

The three trends in sun and beach tourism are: above average growth in **long-haul destinations**; increase in **speciality market segments** in line with identified, differentiated consumer sentiments and requirements, and tourist product developments to meet these, e.g. “boutique” resorts – referred to above, all-inclusive resorts and weddings and honeymoons – both of which are profiled below; and **combination holidays** where the beach is one component along with a touring or special interest element – this type of “packaging” is especially marked for long-haul destinations, and for the mid to upscale segments.

From a destination’s perspective, it should be recognised that for combination holidays it is the range and calibre of the destination’s specific attractions which influence the tourist’s choice, while the delivery of the holiday (i.e. involving experience of various features of the place visited) reinforces and/or further builds understanding of the destination.

By contrast, for the all-inclusive resort or wedding and honeymoon segments, the attributes of the destination that the tourist is looking for are more generic (e.g. a tropical beach setting for the wedding or honeymoon couple). The set of destination attributes is more important than the specific destination in consumer choice. Destinations are readily substitutable. These types of market segments can be seen, thus, to erode or blur destination image differentiation.

Strong image development marketing action to counteract this tendency is a prime requirement for destinations that have substantive business from these types of beach market segments, especially in view of their rapidly increasing share of the beach market. Because of this immense rise in popularity over the last five years, particularly from European source markets, the all-inclusive resorts, and wedding and honeymoon market segments are separately profiled in sub-sections 4.1.2 and 4.1.3 below.

4.1.2 All-Inclusive Resorts

Definition

All-inclusive resorts are those where virtually everything is included in one pre-paid price: airport transfers, baggage handling, government taxes, room, all meals, snacks, drinks and cigarettes, the use of all facilities and equipment and certified instructors. Even gratuities and nightly entertainment are included in this pre-paid price. Some resorts now include sunglasses, bathing suits, toothbrushes, underwear, dresses, pants, socks, sandals and more in the prices of their all-inclusive holidays.

Size of the Segment

All-inclusive resorts are one of the most successful and fastest growing segments of the tourist accommodation sector.

The top seven all-inclusive chains (Club Med, Allegro Resorts, Club Robinson, SuperClubs, Clubs International, Sandals, and Club Aldiana) operate 169 resorts, with a total of 45,000 rooms.

Structure of Supply

The all-inclusive holiday market has taken the Caribbean by storm and in increasing demand for this kind of vacation is driving the development of new resorts worldwide. Destinations as diverse as Mexico, the Gambia, Malaysia, Bulgaria, and Turkey now feature "all-in" packages. Of the Caribbean countries, St. Lucia has the highest proportion of rooms, with over half being in all-inclusive accommodation.

Whilst most of the major operators now have dedicated brochures and operate all-inclusive resorts, Club Med has more resorts than any other, with 77 in 1998. Allegro Resorts and Club Robinson are the next largest with 24 each.

Resort	No. of Resorts	Total Rooms
Club Med	77	25,315
Allegro Resorts	24	6,455
Club Robinson	24	5,397
SuperClubs	12	3,238
Clubs International	12	2,547
Sandals	10	2,032
Club Aldiana	10	840

The draw of all-inclusives lies in their superior performance over non-all-inclusive hotels. Data suggests that all-inclusive hotels perform nearly 50 per cent better, using room occupancy as the measure. However, the concept is not well suited for smaller properties, as the minimum size of 150 rooms appears to be necessary to achieve economic viability.

The all-inclusive sector has diversified significantly in the last few years, and now includes resorts for singles, couples, families, health and beauty, skiing, safaris, cruising and several other specialist interests. There has also been a large growth in the number of European short-haul all-inclusive resorts, with Spain being the most popular destination.

Profile of Consumers

Main Market Segment: Youth/Dinks/Families*

There are no typical all-inclusive travellers any more as there are so many different types of all-inclusive resorts.

All-inclusive resorts cater to visitor psychographics – the way their guests think, feel and behave. They cater exclusively to families (Boscobel, Beaches, Club Med, Robinson Clubs), couples (Couples and Sandals), hedonists (Hedonism II), health enthusiasts (Le Sport) and other segments. However, the most popular all-inclusive resorts are for couples and families.

The opportunity for all-inclusive resorts to appeal to a wide range of markets is well demonstrated by Sandals. When the Sandals resorts were launched in 1981, the concept was to create all-inclusive resorts for couples only. However, to be able to continue to cater to past customers who may have moved into the family stage of their lives, Sandals launched Beaches aimed at the family and non-couples market.

The profile of long-haul all-inclusive clients is different to short-haul. In the European market, short-haul all-inclusives are popular with families, most typically parents between the ages of 35 and 48 with older children who like all-inclusives where there are lots of activities. However, couples without children dominate the long-haul market. These can often be split into two types: couples money no object, and couples value for money (the former typically choosing the Maldives, Cancun or Jamaica, and the latter the Dominican Republic, Sri Lanka or Goa).

Future Trends and Prospects

The growth of the all-inclusive segment is set to continue, although the rate of growth is likely to decrease over the period 1998-2002. The average price of all-inclusive holidays has decreased over the last four years from around US\$ 1,500 in 1995 to US\$ 1,250 in 1998. This has enabled more travellers to afford all-inclusive holidays, and consequently has opened up new markets.

* Dinks: Double/Dual Income No Kids

The growth of short-haul all-inclusive holidays will continue to increase, although at a slower pace than has been experienced over previous years.

As the all-inclusive market matures, there will be an increase in the number of resorts diversifying to appeal to a wide range of market segments and interests. In the Caribbean there is now an all-inclusive resort to suit a wide range of tastes, and even in the short-haul destinations, operators are slowly moulding all-inclusive resorts to target different sectors of the market.

Marketing of the Segment

For operators or resorts establishing themselves in the market, the identification of a clear market segment is essential. To be successful, a market segment should be identified and targeted, whether this is the family market, couples, singles, or a specific activity such as skiing or cruising.

Many of the more successful all-inclusive brands use a very creative marketing approach, spending considerable sums of money on advertising (Sandals spends around US\$ 30 million a year on full page colour adverts, bill boards and sponsorship). Word-of-mouth advertising is also important as is repeat business, and for these reasons every guest to a Sandals resort receives a video of their resort upon check out.

Travel agents can earn more commission from selling an all-inclusive resort compared to a traditional hotel. Consequently there is considerable incentive to sell all-inclusive resorts. However, agents should be educated to ensure the all-inclusive holiday suits the client. Better product knowledge for agents is the key to selling today's all-inclusive product, which has matured out of all recognition over the past five years.

4.1.3 Weddings and Honeymoons

Definition

Wedding and honeymoon tourism refers to overseas trips taken by persons for which their main purpose of travel is getting married (and also commonly taking a honeymoon at the same time), or simply taking a honeymoon after a wedding in the travellers' own country.

The wedding and honeymoon segment is broader than just including those couples who travel overseas for their wedding or honeymoon. It also includes all the persons travelling with the couple to share their wedding and/or honeymoon.

Size of the Segment

Getting married abroad has graduated from a novelty to an established market in less than 10 years. Whilst getting married may not be as popular as it once was, the appeal of getting married abroad has increased. Also, because of the growing divorce rate, more than one third of all

European weddings are now a remarriage for at least one of the partners, and these are clients who are prime candidates for overseas weddings.

Coupled with this, the cost of a wedding abroad is often considerably cheaper than at home, and this has attracted many couples to travel overseas. Several tour operators state that the reason for most of their clients getting married abroad is the restriction on their wedding budget.

The European, North American, Australian and Japanese markets exhibit the highest propensity to marry overseas. In the United Kingdom there are around 300,000 marriages each year, with the number of couples getting married abroad growing from 18,000 in 1997 to an estimated 30,000 in 1999.

This means that around 10 per cent of all British couples getting married today are travelling abroad for the ceremony. The British tour operator Thomson has seen an 80 per cent rise in the number of wedding holidays they have sold in the last four years, and several other tour operators in Europe report up to a 300 per cent increase over the last five years.

In spite of the current decline in the Japanese economy, nation-wide bookings for overseas weddings were estimated to have risen by 39 per cent in 1999 over the number booked in 1998.

The honeymoon market is older and more established than the wedding one, however, it shares many similar attributes, such as the high propensity of couples to spend money more liberally than on a conventional holiday. With an average 2.4 million marriages annually, the United States honeymoon market generates a constant US\$ 32 billion annually, with travel related spending estimated at US\$ 4.5 billion.

In the United States, Europe and Japan it is estimated that 99 per cent of newlywed couples take a honeymoon, with 68 per cent, 85 per cent, and 98 per cent of these being taken in a foreign country respectively. The 98 per cent for Japan is the highest percentage ever recorded in the 21 years since the Japan Travel Bureau first checked this statistic.

The honeymoon market tends to remain strong throughout recessions and periods of economic troughs. There are few seasonal limitations as couples get married the year round, with the busiest marrying months in the United States and Europe being May to October. Newlywed couples tend to have more disposable income than the average traveller, with over 80 per cent of brides and almost 90 per cent of grooms being employed. Couples tend to spend around three times more on a honeymoon than they would on an average overseas holiday.

In the United States and Europe, the average honeymoon trip lasts 9 days, compared to a 5 day average amongst leisure travellers. In the United States, 34 per cent of honeymooners choose an all-inclusive resort.

The average length of overseas honeymoons for Japanese couples is 8 days. By contrast, the average length of domestic honeymoons is 5 days.

Structure of Supply

With the wedding and honeymoon market being such a growth segment, it is hardly surprising that it has attracted the interest of a large number of tour operators who are now producing specialised wedding and honeymoon brochures. Several tourist offices, such as the Bahamas, now produce their own guides to weddings, and countries such as Jersey have changed legislation to make it easier for non-residents to marry.

The Caribbean remains a firm favourite for European and American weddings and honeymoons, with the key destinations being the Dominican Republic, St. Lucia, Barbados, Antigua and Jamaica. For Europeans alone, Kenya, Mauritius, the Seychelles, and Florida also regularly feature in the top five destinations. The American market's second favourite destination after the Caribbean is Hawaii, followed by Mexico, Bahamas, and Europe. The Japanese market's top destination for weddings is Hawaii, followed by the US mainland, and Guam/Saipan.

The operators have kept the prices of wedding and honeymoon packages well below the price of a wedding reception at home. The average package price is US\$ 3,600 compared to around US\$ 14,500 for a ceremony and reception in a typical European country. The relative saving means that many couples are willing to spend money on upgrades and extras, which provide the operators with higher profit margins.

All-inclusives are growing in popularity for weddings and honeymoons, and the big four in the Caribbean: Clubs International, Couples, Sandals, and SuperClubs have a total of 23 resorts throughout Antigua, the Bahamas, Barbados, Jamaica and St. Lucia. All these clubs report increased demand year on year, with more couples buying extras such as helicopter transfers. Sandals, which operates 10 couples-only all-inclusive properties in the Caribbean estimates that up to 60 per cent of its clients are newlyweds.

Whilst most of the Caribbean and Indian Ocean destinations offer a typical tropical location for wedding ceremonies, there are a number of destinations offering distinctly different products to attract couples. Underwater weddings (using scuba diving equipment) are possible in Key Largo, Florida. Las Vegas offers Elvis impersonators to sing at weddings held in small "Chapels of Love" throughout the city. In Lapland, there is an Ice Hotel and Chapel that is rebuilt each year. At -10°C the rooms are cold, but the beds, which are also made out of ice, are covered in reindeer hide. Florida's Disney World hosts 600 weddings each year. Other unusual locations include alpine villages, castles, cruise ships, hot air balloons, and helicopters.

Profile of Consumers

Main Market Segment: Dinks

The nature of the wedding and honeymoon market means that the customer profile is relatively easy to define. However, it should be noted that whilst the large proportion of the market is the 20 to 35-year-old age group, getting married overseas is particularly popular with persons who are remarrying, typically the 35-55 year age group.

The spending power of marrying couples, or those going on a honeymoon, tends to be higher than the average traveller due to the relative youthfulness of this market. However, it should be noted that many couples get married overseas to avoid the high cost of weddings at home, and therefore might not typically be big spenders.

Future Trends and Prospects

While the tropical beach honeymoon undoubtedly remains the firm favourite, there is a trend towards more activity oriented honeymoons which incorporate elements such as exploring rain forests or going trekking. Increasingly, honeymooners will want to do some sight seeing as well as relaxing by the sea.

Another emerging trend is noted by short break operators which report that couples in high pressure jobs often cannot afford the time to take the traditional long-haul honeymoon and are opting instead for top-of-the-range packages in romantic cities such as Paris and Venice.

All-inclusive resorts (principally in the Caribbean) will continue to grow in popularity, particularly for honeymooners taking their first long-haul holiday. All-inclusive resorts are seen as ideal honeymoon destinations as they provide a completely stress free relaxed environment for newlyweds after the often hectic build up to their wedding day.

In tandem with the growth of short break honeymoons, there is also a strong growth in the number of long-haul weddings and honeymoons. This has been noted by the growth of Australia as a destination for Europeans. In 1999, Australia moved into the top ten wedding destinations for UK residents for the first time. This is mainly due to the growing number of people in their mid-30s who can afford to go further and are looking for different destinations.

In Japan, the main trend is towards honeymoons that are cheaper, nearer and shorter. There is also a growing popularity of beach resorts for Japanese honeymooners.

Overall, increasing numbers of couples getting married abroad are travelling with their immediate family and friends. It is also common for several couples to travel abroad as a group.

Finally, there is a trend of marriages in more off-the-beaten track or unusual locations. In another 20 years it may also be possible to get married or take a honeymoon in space.

Marketing of the Segment

With more and more destinations and tour operators offering a wedding and honeymoon range of products, they are having to fight harder to distinguish their destinations or packages from others looking for a slice of the wedding and honeymoon market.

Las Vegas trades on its reputation for "quickie" marriages. There is no waiting period, and you do not even have to get out of your car. Services at Walt Disney involve couples being transported to

the Wedding Pavilion in a Cinderella-style glass coach, complete with six ponies and costumed footmen. A selection of Disney characters, including Mickey and Minnie Mouse are available to attend the reception. These two examples show how Las Vegas and Disney differentiate their product. This will be the key for destinations in the future. There are gaps in the market for weddings and honeymoons in unusual or new locations/destinations. Destinations wanting to establish themselves in the market should seek features that make their product stand out from the rest.

On the Internet, a new weddings Web site is attracting travel companies to put their products online to cash in on the market. WebWedding.co.uk has been created to provide a one-stop shop for couples arranging their marriages. Several operators have already signed up to the site that aimed to tap into 10 per cent of the UK wedding market in the beginning of the year 2000.

4.2 Sports Tourism

4.2.1 The Range of Sports Tourism

The relationship between sport and tourism is gaining momentum in the tourism industry, and this has mainly come from five basic directions:

- The popularity of international and national sporting events has increased significantly, i.e. the Olympic Games, World Cups, and regional (European, Asian, etc.) Championships.
- There is a wider understanding of the health related benefits that can be achieved through active participation in many sports.
- Governments and leaders are beginning to appreciate the value of sport with regard to both the economy and national and international relations.
- There is a wider and carefully programmed variety of sporting events on offer throughout the year, facilitating spectator and participant alike.
- Sport minded individuals are not only more mobile, but are also able to communicate more effectively due to improvements in technology and global infrastructure.

Sports Tourism can be defined as individuals and/or groups of people who actively or passively participate (i.e. spectate) in competitive or recreational sport, whilst travelling to and/or staying in places outside their usual environment. The decisive criteria here is that sport is the prime motivation to travel, though the tourism element may act to reinforce the overall experience.

A hard definition of the sports tourist is quantified by active participation or spectating (passive participation) at a competitive sporting event. We can classify a hard sports tourist as someone who specifically travels for either active involvement or to spectate in competitive sport. Therefore the sport is their prime motivational reason for travel. This encompasses major sporting events such as the Olympic Games and the World Cup. The competitive nature of these events is the distinguishing factor.

A softer definition of the sports tourist would be someone who specifically travels and who is primarily involved in active recreational participation of a sporting/leisure interest; for example skiing and walking holidays. The active recreational aspects are the distinguishing factors here.

The most common types of soft sports tourism are winter sports (most prominently skiing), scuba diving and golf. However, it also includes walking, trekking, biking, tennis and other ball games. Whilst originally the domain of specialist tour operators exclusively, many of the large operators are now including sports tourism in their brochures. In this segment report, the focus is on the two most significant stands of sports tourism: winter sports, and scuba diving and other water contact/sub-aqua activities.

4.2.2 Winter Sports Tourism

Definition

Winter sports covers a wide range of activities which, despite the name, do not necessarily have to be undertaken in the winter. However, they do take place in a cold climate. Some “Winter Sports” can be undertaken in the summer, due to high altitudes allowing the activities to take place: for example it is possible to ski on glaciers in the Alps at any time of the year.

In general, Winter Sports Tourism can be defined as activities of visitors to a destination for which their main purpose of visit is for: snow skiing (either downhill or cross-country), glacier skiing, ski-dooing, snowmobiling, sledding, sleigh riding, bobsleighbing, dog sledding, snowbiking, snow shoe walking, snowboarding, skiboarding, , snowskating, telemarking, ice-skating or other snow or ice based activity.

Size of the Ski Segment

Statistics concerning the size of the ski segment are difficult to calculate. However, it is estimated that there are 11 million skiers in the United States, 4 million in Canada, and 8 million in Europe. These figures relate to alpine skiing and not to snowboarding or cross-country skiing. In the United States there are estimated to be around 4 million snowboarders, and 3 million cross-country skiers. Only in 1998 has the number of snowboarders overtaken the number of cross-country skiers.

Different markets exhibit different growth patterns. For example, the United Kingdom market was extremely stagnant in the first half of the 1990s, but since then has shown year on year growth with around 830,000 Britons taking a foreign ski trip in 1998 (an increase of 10 per cent on the previous year). Of these trips 57 per cent were booked with tour operators, 25 per cent were taken independently, and the remainder were school trips.

In 1998, ski resort visits in the United States increased by 3 per cent to an estimated 54.1 million visits compared to 52.5 million visits the previous year. This represents the second highest number of visits since records began 20 years ago (the highest number being in 1994). A skier/snowboarder visit represents one person visiting a ski area for all or part of a day.

Overall, there are estimated to be around 25 million skiers worldwide, with around 10 million others participating in snowboarding, cross-country skiing, and other fringe winter sports such as sledding, snowbiking, etc.

Structure of Supply

The main ski resorts are located in Europe (mainly the Alps and to a lesser extent the Pyrenees), the United States, and Canada. Within Europe, France, Italy, Austria and Switzerland are the most popular destinations, however, some of the countries of Eastern Europe, such as Bulgaria, Romania, and Slovenia have entered the mainstream ski market and appear in many of the large

operator's brochures. Their products tend to be less sophisticated than the resorts in the more established locations in the West, however, they compensate for this with relatively low prices.

The ski resorts of the United States and Canada have grown in popularity with European skiers in the last five years. In 1998, between 5 and 10 per cent of skiing trips taken overseas by Europeans were to North America. Chartered flights and the introduction of non-stop scheduled flights to ski locations (such as British Airways recently launched flights from Gatwick to Denver) have meant that despite the extra hours in the air, prices are kept relatively low, and in many cases comparable to European ski prices. Other attractions are good quality accommodation and services, more reliable snow, and (for the British market) no language barriers.

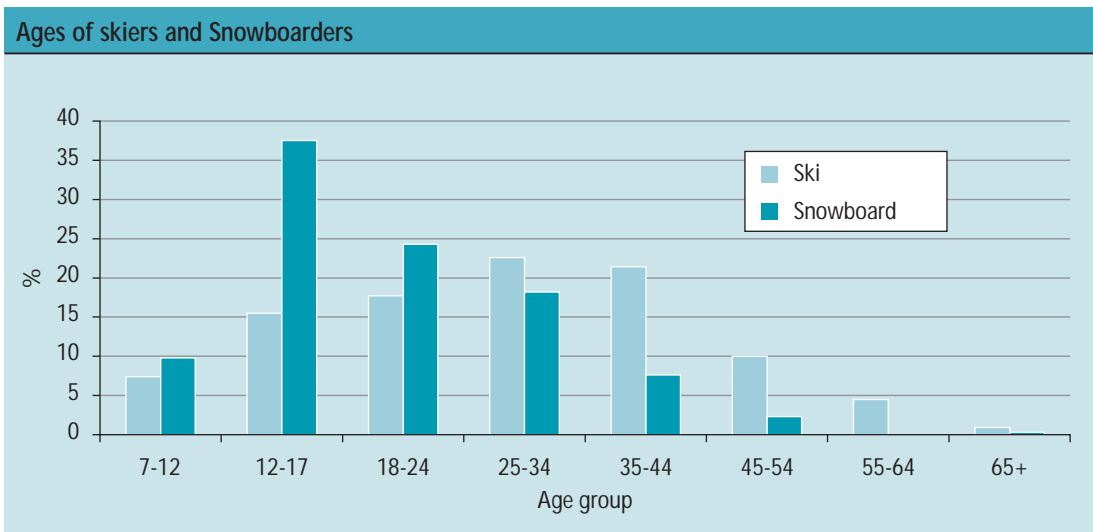
Whilst Canada is currently attracting more skiers from some of the European markets than the United States (last year 35,000 Britons travelled to Canada compared to 20,000 to the United States), the United States is considered to have marketing muscle and is expected to regain its share in the next five years.

Several large ski operators have established themselves, especially in the main European source markets, and most sell packages to all the European countries offering skiing, and also to the United States and Canada as well. However, less mainstream activities such as cross-country skiing, dog-sledging, and snowmobiling are likely to remain the domain of the specialist operators.

Profile of Consumers

Main Market Segments: Youth/Dinks/Families

Surveys of skiers in Europe and the United States show that the largest age group is the 25 to 34 year old bracket. Snowboarders tend to be younger, with the largest segment being between 12 and 17 years. Cross-country skiers tend to be older, with the largest segment being between 35 and 44 years.



Skiers tend to be young, single males (60 per cent male to 40 per cent female). The male dominance is even higher with snowboarders (around 75 per cent). There is a more even split between the sexes for cross-country skiing, although it is still slightly male dominated.

Whilst skiing has become more affordable in recent years with the introduction of large scale tour operations and also some Eastern European resorts offering skiing, the average income of skiers remains high, with 60 per cent earning over \$50,000 per year.

With regards to education there appears to be an even spread, with 30 per cent being educated to degree level or above, 30 per cent with no certification, with the remainder having school or college education.

Other sports that are favoured by winter sports participants are swimming, mountain biking and golf.

Future Trends and Prospects

Aside from the weather and the general economic climate, the ski industry in Europe tends to be highly governed by exchange rates, due to the high proportion of border crossings. However, with the steady introduction of the euro throughout Europe, this will prove to be less of an important factor in the new Millennium.

Despite the fact that the family market is one that is highly volatile as it is particularly vulnerable to economic downturns, it is currently an expanding market, and many operators are aware that if children catch the ski bug early, they will be potential ski or snowboarding clients for life. Many operators have recognised this and increased the availability of children's clubs and nanny services.

With regards to the individual winter sport activities, (downhill) skiing will continue to dominate the winter sports market, however, snowboarding continues to be the major growth segment of the ski industry in the United States and Canada. Snowboarding represented 21 per cent of the total ski area visits in the United States in 1998, up from 18 per cent the previous year, representing an increase of about 18 per cent. The current rate of growth of snowboarding is expected to moderate over time as the proportion of riders increases, especially with the explosion of other new ski technology such as fat skis and parabolics.

In line with the worldwide trend of travellers taking shorter breaks, the concept of weekend skiing is expected to develop and increase in popularity. Resorts such as Chamonix in France, Champéry in Switzerland, Alagna in Italy, and Lech in Austria are all located close to international airports which allow fast transfer for skiers flying in for two or three days skiing.

The slow but steady growth of ski trips by train or car will also continue. Both modes (but in particular the car) allow the traveller maximum flexibility for last minute travel arrangements. Eurostar rail services specifically for skiers have commenced in recent years and are set to expand in future years.

There is also a trend for travellers to seek out new destinations or travel to places not generally recognised as typical ski destinations. Whilst the volume of these travellers will increase over the next decade, it will be from a small base. Examples will include skiing in Alaska, or year round skiing offered by glacier skiing in the Alps. Other locations are likely to include mid-summer skiing in Riksgrawsen (Sweden) which is 20 miles inside the arctic circle, or southern hemisphere skiing in Las Lenas, Argentina, La Parva, Chile, or in Victoria or New South Wales in Australia.

Surveys show that a large majority of skiers are unaware of their negative impact on the environment. The use of snow machines to extend the season is thought to be particularly damaging due to the effect it has on the development of plant life. Whilst many resorts will continue to extend their seasons regardless, several ecologists expect global warming to severely affect the ski industry in Europe in the long term, that is the next 50 to 100 years.

Marketing of the Segment

Whilst the success of any destination attempting to develop its ski market will be largely dictated by its natural surroundings (that is the quality of ski slopes available), the infrastructure will play a large part in its success or failure.

Skiers like to spend as much time as possible skiing down slopes, as opposed to travelling up them. Therefore fast and efficient lift systems are essential, and the relatively close proximity of accommodation to the lifts is also important. Skiers also seek a good network of mountain restaurants and cafes.

Despite the relative maturity of the ski market, marketing resorts or packages to travellers via travel agents still has many problems. Many agents are still largely ignorant, and it is estimated that eighty per cent of multiple travel agents have never put on a pair of skis. Consequently specialist agents are currently increasing their market share, as they have the advantage of detailed knowledge of the resorts they are selling. Many operators are attempting to increase agents' knowledge of skiing through educational in resorts and also on dry ski slopes in their own countries.

4.2.3 Scuba Diving (and other water contact/sub-aqua activities)

Definition

Scuba Diving Tourism refers to persons travelling to destinations with the main purpose of their trip being to partake in scuba diving. The attraction of the destination is almost exclusively related to its dive qualities rather than any other factor, such as the quality of accommodation or land-based attractions.

Underwater tourism is not limited to scuba diving; other water contact/sub-aqua activities include surfing, underwater walking, and rides on tourist submarines.

Size of the Segment

It is estimated that there are around 6 million certified divers worldwide. Over one-third of these are European, with the other main scuba diving markets being the United States and Australia. However, there is strong growth in the Asian markets, albeit from a small base.

The Scuba diving segment is reported by some sources to be the fastest growing segment in the tourism industry. Worldwide, the diving industry earns between US\$ 4 to 6 billion annually.

Structure of Supply

Coral reefs take up around 0.3 per cent of the globe's total ocean surface area, and whilst scuba diving is not limited to coral reefs, they tend to be the principal attraction for most divers.

In general, divers tend to look for five main attributes when assessing a dive location, they are: clear water, good visibility, plenty to do and see underwater, good diving facilities (close to dive sites and lodging) and dive centre staff who speak the diver's language.

Whilst the list of the world's top dive sites is subjective, it is generally accepted that the following destinations offer a high quality diving experience:

- The Red Sea: Sharm El Sheikh, Ras Muhammad, Sha'ab Abu Nuhas, Straits of Tiran, and the wreck of the Thistlegorm (a Second World War cargo ship sunk in 1941).
- The Caribbean: Caymans, Cuba, and New Providence Island.
- Indian Ocean: Seychelles and Maldives.
- Southern Africa: South Africa and Mozambique.
- South-East Asia: Thailand, Malaysia, Indonesia and Philippines.
- Australia: Great Barrier Reef.
- Melanesia: Fiji, Vanuatu, the Solomons, Papua New Guinea.
- Micronesia: Yap, Palau, Truck for reefs and sunken Japanese ships.
- Eastern Pacific: the Cocos, Malpelo and Galapagos.

Live-aboard boats, which make dive sites that were previously difficult or time consuming to access, are growing in popularity. However, prices tend to be much higher than for shore-based diving trips.

Profile of Consumers

Main Target Segment: Singles/Dinks

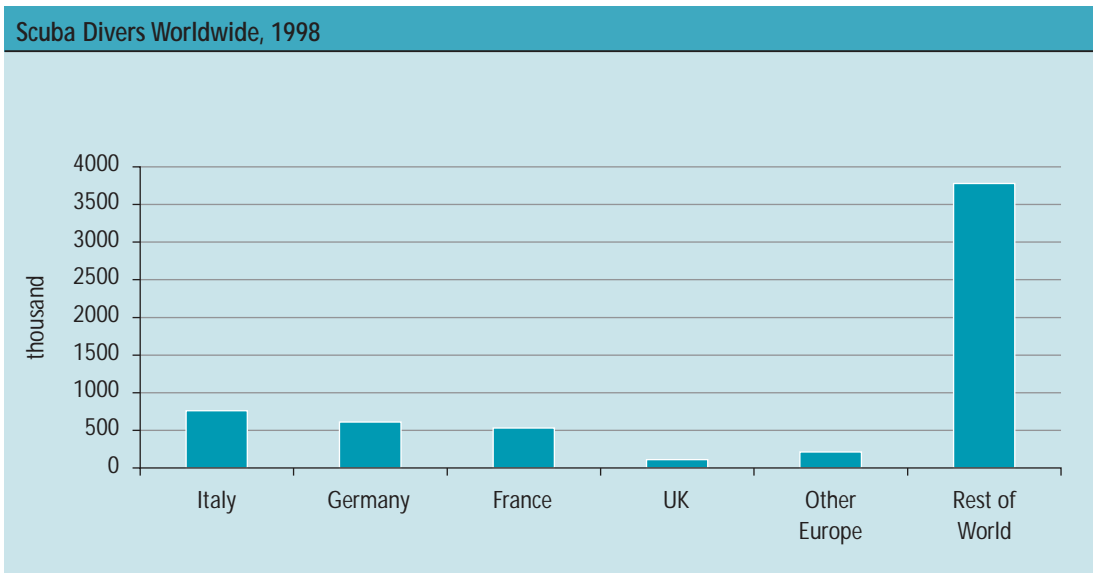
The profile of the dive segment tends to be quite different from the profile of international travellers in general. There are several distinct attributes of this market:

- Most divers have a fairly large disposable income, tend to be young and single, and are aged between the late 20s and early 40s, and are drawn from the professional and self-employed classes. In the United States, 80 per cent of the dive segment is under 50 years old, compared with only 47 per cent for all US international travellers. In addition, 78 per cent of the dive segment are in full-time employment, compared with 55 per cent of other international travellers. The average wage of a diver in the United States is \$80,000, which is considerably higher than the average wage of other international travellers.
- One-in-three divers take foreign diving holidays while the most ardent diving enthusiasts will take multiple diving holidays every year or will take a specialist diving holiday on their own plus a second holiday with the family.

Sub-market segments can be identified as follows:

- *Cheap and cheerful* – mainly young, often organised low-cost dive holidays;
- *Dive fanatics to short-haul destinations* – sole purpose of travel is diving, usually travel in groups with clubs/friends;
- *Dive fanatics to long-haul destinations* – well-off, keen to dive during a beach resort long-haul holiday or sole purpose is to dive;
- *Sideline divers* – make one or a few dives on a general family beach resort holiday.

The main European markets are Italy, Germany, France and the United Kingdom. In 1998, it was estimated that there were over 2.2 million certified scuba divers in Europe.



- Italy – the Italian dive market is heavily skewed towards the sideliner segment, with as much emphasis on the resort facilities as on the underwater attractions. The Maldives and the Egyptian (and other) Red Sea resorts are the most favoured destinations, with around 75,000 Italians visiting the Maldives in 1998, and as many as 30,000 taking holidays to Red Sea destinations, in both cases, the great majority of whom would engage in some diving activity.
- United Kingdom – research shows that of the 110,000 British divers in 1998, between 20 and 25 per cent took an overseas dive holiday. The Red Sea is the leading destination with principal access achieved through charter flights to Hurghada and various scheduled service operations. The UK market comprises principally *dive fanatics*, but with significant representation also of *cheap and cheerful* and *sideliners*.
- Germany – of the 610,000 German divers, around 150,000 took an overseas holiday in 1998, and demand for overseas holidays is estimated to be growing at the rate of 15 per cent a year. The Maldives is the leading destination followed by the Red Sea. This may indicate that there are less *dive fanatics* and more *sideliners* in the German than the British diving market, a possibility that is further supported by the fact that German expenditure on scuba dive holidays is considerably higher than that of the British. The bulk of this extra spending by Germans is on higher-grade accommodation (typically three of four star) whereas the *dive fanatics* prefer to stay at less expensive accommodation concentrating the highest possible proportion of their budget on underwater activities.
- France – although there are almost twice as many French divers as in Germany, the level of overseas diving holidays taken by the French is considerably lower with most French divers practising their sport in domestic waters. The total French overseas dive market was estimated by tour operators as 30,000 in 1998. The principal overseas destinations are the Red Sea resorts of Egypt, followed by the Maldives. One quarter of the market is constantly seeking out new destinations to explore underwater – the *dive fanatic* segment.

Future Trends and Prospects

Whilst scuba diving is a sport which is well known and practised worldwide, it is a market segment that is forecast to show strong growth over the next five to ten years. As the world becomes increasingly explored, and fewer destinations are left for tourists to discover, there is a trend to travel to unusual “territories”. Travel underwater is therefore gaining appeal in the marketplace. It is widely believed that the underwater sports market has the potential to grow as large as the ski sector.

As with many other segments, such as cruising, many of the large tour operators are now moving into the scuba dive market, a market that was once mainly the domain of the specialist operator. This is being accelerated by the merger of many small operators into mainstream operators. The consequence of this is the improved access to a larger network of flights, and subsequently a wider range of dive destinations, including a number of short-haul dive destinations such as Malta, Gozo, Cyprus, the Canary Islands, Corfu, and Turkey. These destinations are becoming increasingly popular in the summer when temperatures in the Red Sea are too high. This trend, which is introducing

destinations that also appeal to non-divers, means that families where only one member is interested in diving are also being attracted. The introduction of charter flights have also made many destinations, especially those in the Caribbean, more affordable and accessible.

Although the majority of divers are men, there is a strong growth in the number of women taking up the sport. The singles market is tipped for strong growth, especially for individual women travellers. As diving must always be undertaken with a "buddy", singles get to meet other people, which is a strong attraction of such a holiday. Whilst the singles market is expected to experience strong growth, there is evidence that another growth market segment for diving is couples: pre-marriage and/or pre-family.

Divers are becoming more adventurous, and are looking further afield for bigger and better thrills. Around one quarter of the active travelling scuba market is constantly seeking new dive locations, and consequently, destinations which are seeking to develop their tourism industry often look to the dive market as a segment to develop. The added attraction is that as long as the diving is good, high quality accommodation and infrastructure are not important.

The next five years are likely to see an explosion of new dive venues throughout Asia. Newly explored reefs, freshly discovered underwater caverns, colonised shipwrecks, recovering earthquake and volcano eruption sites and artificial concrete and tyre-substratum reefs will provide exciting diving from the Solomon Islands to India's Lakshadweep Islands. The number of dive operators in Indonesia has doubled in the last six years, especially at the off-the-beaten-track sites. New operators can be expected at all of Asia's reefs within the first five years of the next Millennium. Peninsular Malaysia will see resorts open each season, as will, most notably, the Philippines, the South Pacific and the Maldives.

However, some less well known destinations such as Cuba, Eritrea, and in the next five to ten years, Saudi Arabia and Libya are also likely to attract divers. Cuba is tipped to experience the highest growth rate of diving holidays in 1999, albeit from a relatively small base.

Despite the common image of scuba diving being an activity undertaken in warm waters and amongst colourful coral, cold water diving destinations are perceived by many divers as the last frontier, and provides them with the chance to escape from the masses flooding the Mediterranean, Red Sea, Caribbean, and parts of the Pacific. Cold water diving offers a greater variety of experiences and possibilities, and in many areas, provides the added opportunity to view a larger number of shipwrecks than can be found in warmer waters. In many places there is an industry which is yet to be fully developed, especially along the West Coast of Ireland, and the Scottish coast and its Western Isles.

With all the information on what to expect from brochures and through the Internet, the onus of choosing a resort and sizing up the amount of creature comforts to expect, is not on the industry but on the diver. Choices of accommodation will be many in the 21st century. "Design and boutique" dive resorts are fast becoming the rage, while die-hard divers will continue to forsake all creature comforts in their quest to get wet. One of the exciting dive venues launching the industry into the next century is self-contained live-aboards. Numerous new and well-established dive boats already conduct one or two-week tours of hitherto inaccessible reefs.

Whilst research based on tour operator's experiences, and those of national diving clubs within the European and American markets shows widely varying growth rates and projections, it is estimated that there will be around 7 million certified divers by the end of the year 2000, and around 10 million by 2005. In the same respective years, it is expected that around 2 million and 3 million will take a dive holiday of some sort.

Threats to the scuba dive market come in the form of environmental damage to the very product most divers travel to see: the reefs. Coral reefs are home to 25 per cent of all marine fish species, but take up only 0.3 per cent of the globe's total ocean surface area. Whilst environmentalists differ in opinion, it is thought that 10 per cent of the world's coral reefs may already be degraded beyond recovery, and 60 per cent may now face a medium to high threat of destruction. Destruction of reefs tends to come from fishing, over-diving, or "bleaching" which is thought to be linked with global warming of the earth's oceans. Clearly, measures need to be put in place to prevent destructive fishing techniques over coral reefs, and also ensuring divers respect the reefs by careful swimming, not taking souvenirs, and not dropping anchors from boats onto reefs before setting out on a dive.

Marketing of the Segment

There are several key guidelines that destinations should aim to follow when seeking to market the scuba destination. They are as follows:

- Evaluate the quality of diving available;
- Determine which dive segment to target (e.g. dive fanatics), and ensure it matches the type and quality of diving available;
- Determine which source market to target;
- Seek appropriate media through which to communicate the marketing message. The fanatic segment can be reached through mailings to memberships of specialist dive clubs or associations, via the brochures of specialist tour operators, and participating in specialist dive shows.
- Ideally, the source market to be targeted should have direct or a one-stop air service. Where scheduled flights are not available, chartered services should be considered.

Whilst travel agent understanding of the scuba diving segment is increasing, many agents still require further training. A parallel can be drawn with skiing in the 1970s: agents were wary of selling it because they did not understand it. Further educationals are required for travel agents to increase their understanding of the segment.

Other Water Contact and Sub-Aqua Activities

Underwater tourism is not limited to scuba diving. Those wanting a more leisurely experience can travel underwater in a range of purpose-built tourist carrying submarines. In 1998, more than three million passengers took rides in such sub-aqua vehicles. Several destinations are planning the introduction of tourist submarines in the next five years.

For those that want an underwater experience but have not mastered swimming, or wish to remain upright, underwater walking sends people walking into the underwater realm donned in weighted suits and outfitted with air hoses connected to an air supply above the surface.

Surfing is a sport that is currently experiencing a fast growth in popularity. It is estimated that there are currently around five million surfers worldwide, and whilst the West Coast of America and Australia account for a large proportion of these, many European countries have a large surf following. Popular destinations for surfers include France, Spain, Portugal, Indonesia, and Central America.

4.3 Adventure Tourism

Definition

Adventure Tourism refers to trips undertaken by tourists seeking to engage in activities that are typically (but not necessarily) oriented to physical exertion. Adventure tourism tends to take place in remote or relatively unexplored areas.

Adventure tourism can be further defined as hard adventure and soft adventure. Hard adventure is an outdoor activity that is usually considered to be somewhat unique and exciting. It may involve a certain level of risk and require some skill on the part of participants. Transport is generally human-powered. Travellers usually camp or stay in remote cabins or lodges with few amenities. Examples include activities such as rock-climbing and mountaineering, hang-gliding, diving, and white-water rafting on difficult rapids.

Soft adventure is less active, may use mechanised transport and more comfortable accommodation, such as a bed and breakfast guesthouse or a resort. Typical soft adventure trips include bird watching, hot air ballooning, or cycling.

Size of the Segment

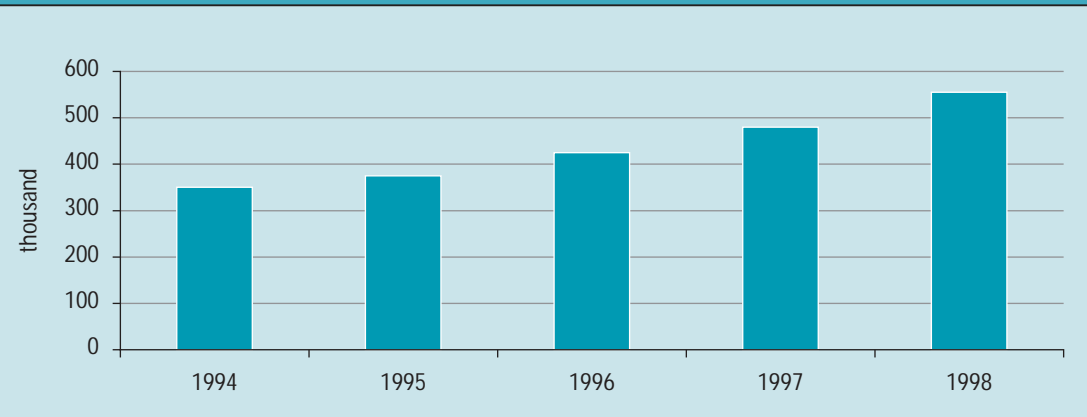
With the adventure tourism segment being so diverse, it is difficult to quantify as a whole. However, it is estimated that in 1998 there were a total of 555,000 adventure tourism trips taken by European travellers.

Whilst this shows significant growth over the past five years, it still only represents 0.5 per cent of tourism expenditure by European countries. Germany was the top generating European market, with 130,000 travellers in 1998, followed by the UK with 100,000 and France with 80,000. Adjusting for population size, however, Germans are only a little more likely to take an adventure holiday than the French, but slightly less likely to do so than the British.

Many operators talk of 15 to 20 per cent growth a year. If this present growth rate continues, the market will surpass one million in 2003. If one takes a broader definition of adventure travel (as is the case with the American market, below), then the figures will be proportionately greater. These figures do not include those who travel independently, for example, or those who make their own travel arrangements.

The average price for an adventure holiday booked through a tour operator in Europe was around \$1,500 in 1998, which would mean a value of US\$ 833 million for the total European market.

Adventure Travel from European Countries (pax)



The adventure travel industry in North America is a major niche market. It is estimated that in 1998, 85 million people (around 40 per cent of the population) took an adventure trip. It is estimated that adventure travellers paid US\$ 45 billion on holidays, which included some kind of adventure activity. Some travel industry sources claim that annual revenues generated by the adventure travel sector – including transport and expensive equipment such as jeeps and rafts – could be as high as US\$ 240 billion. These figures may seem high, but adventure tourism, as defined by the North American travel industry, includes a wide variety of activities – from a walk in the woods, to canoe trips in the Amazon.

Structure of Supply

Many of the major European tour operators were set up in the 1970s and often the company founder, or founders, handled everything themselves. More operators were established in the 1980s, and now, at the end of the 1990s, competition is fierce. For the most part, each operator tries to develop a particular niche and avoid head-to-head battles, although that is not always possible. Explore Worldwide is the leading operator in Europe, with 25,000 sales in 1998, closely followed by Jumbo with 22,900, and Wikinger Reisen with 15,000.

The destinations these operators visit vary; however, there are destinations so significant to adventure travel that they are certain to appear in many operators' brochures. Nepal is one of those countries, with South America growing in popularity, and Ecuador and Peru now being introduced in many brochures.

Adventure destinations have a tendency to be politically unstable, and therefore operators who focus too heavily on one destination or region run the risk of losing sales if there are problems in the destination.

Also, companies for whom adventure is only one part of their business are likely to experience below average growth in sales. It appears that generalist operators do not have the right image for people contemplating an adventure holiday, and this suggests that mainstream operators would be well advised to operate through specialist subsidiaries rather than specialist brochures bearing the mainstream brand.

In North America, there has been a large growth in the number of new adventure travel operators in the last decade. According to the Adventure Travel Society, there are over 8,000 companies in the USA catering to adventure travellers. In Canada, there are over 700 such operators. As North Americans have a huge choice of destinations within their own continent, it is not surprising that around 80 per cent of their trips are within the USA and Canada, with another 10 per cent in Central and Southern America. However, outside of the Americas, Eastern and Southern Africa, Nepal, and the South Pacific are popular.

Profile of Consumers

*Main Market Segments: Youth/Dinks/Empty Nesters**

The typical adventure traveller is well educated, well travelled, aged around 40, and is at the peak of their career with a large disposable income. As organised adventure holidays tend to be quite expensive, it is the middle-aged rather than the young who tend to have the necessary income and the long holiday entitlement. Nowadays, it is not exceptional for those in the 40-60 year-old age bracket to be physically fit enough to trek five hours a day or more, or sleep in a tent at night.

The market for adventure travel – particularly soft adventure trips – is growing as the population ages. Retired people and ageing “baby-boomers” are taking up hobbies like bird watching and hiking in unprecedented numbers. At the other end of the risk scale are the travellers who are coping with their stress by taking up so-called “extreme” sports, such as sky diving, mountaineering, and bungee jumping.

Although younger age groups are theoretically more able to cope with the physical demands of an adventure holiday, the young people taking adventure holidays tend to travel independently, partly because they do not like group travel, but also because the price of an adventure package would simply not be affordable.

Adventure holidays are generally not designed for families with young children -although a few operators have introduced family adventures- nor for families with teenage children.

Future Trends and Prospects

Adventure travel will become more commonplace in the 21st Century as travellers become more adventurous and want to experience something different.

With several adventure operators reporting large growth (over 18 per cent) in sales of adventure tours in 1999, the number of European adventure travellers is on target to pass one million for the first time in 2003.

* Empty nesters: couples whose children have left home.

Adventure tours are likely to get shorter, with adventures of one week becoming more commonplace in Europe. Domestic adventure trips taken by North Americans are already relatively short (average 6.9 nights for an active holiday and 5.4 nights for a soft holiday), and with better communications and transport arrangements, Europe could be condensed, especially to destinations such as Morocco or Libya, where both the distances from Europe and differences in time are small.

In the future, there will be more adventure for families, with packages such as donkey trekking, camel trekking, and cowboy ranches specifically for family groups.

The fastest growth area in the adventure tour sector will be by the specialist operators. Many of these operators will cater for the emergence of high-risk activities, such as paragliding, sky surfing, shark swimming, and coasteering.

The arrival of space tourism within the adventure tourism segment is expected with the first tourists taking trips into space in 2003. It is forecast that by 2020, there will be one million tourists a year taking trips into space.

Concentration in the adventure sector looks set to increase. It is increasingly likely that successful operators in the main tourist generating countries of Europe will look to purchase similar operations in other European markets.

Marketing of the Segment

Surveys indicate that 75 per cent of adventure travel packages are booked directly through tour operators. This is an alarming statistic for travel agents, but feedback from clients indicates that they are by-passed because special interest travellers typically discover that their agents know very little about their product.

When selling the segment, destinations and agents should begin by surveying their potential customers on the types of adventure travel package they might want to book. The special interest adventure traveller is different from the regular tourist in that they have motivation. They have interest in fulfilling a dream rather than getting from point A to point B.

Focus should be on the traveller's emotions, using words that convey the message that can make their dream come true. More specifically, the focus should be on the activity first, and the travel details second.

It is the destination (rather than any infrastructure) that tends to determine the suitability for the development of adventure tourism. Accommodation requirements can be minimal-to-moderate standard.

4.4 Nature-Based Tourism

Definition

The term *ecotourism* was coined by Hector Ceballos-Lascurain in 1983, and was initially used to describe nature-based travel to relatively undisturbed areas with an emphasis on education. The concept has, however, developed to a scientifically based approach to the planning, management and development of sustainable tourism products and activities.

The Centre for Ecotourism at Pretoria University provides one of the most precise definitions of ecotourism: It is an enlightening, participatory travel experience to environments, both natural and cultural, that ensures the sustainable use, at an appropriate level, of environmental resources and, whilst producing viable economic opportunities for the tourism industry and host communities, makes the use of these resources through conservation beneficial to all tourism role players.

The EcoTourism Society simply defines ecotourism as responsible travel that conserves natural environments and sustains the well-being of local people.

Ecotourism goes by many different names: adventure travel, nature-based travel, environmental or ecological travel, scientific expeditions, cross-cultural exchange, language study, reality tours, earth restoration projects, wilderness tours, wildlife safari tours (including birdwatching, dolphin watching, elephant trekking, gorilla safaris, polar-bear watching, wildebeest migration, wolf and bear watching), etc.

Size of the Segment

According to several travel journals and industry sources, ecotourism is the fastest growing segment of the travel industry. Travellers, like most of the general public, are becoming sensitive to issues concerning the environment.

As the definition of ecotourism varies, so therefore does the estimated number of "eco-tourists" worldwide. Based on the EcoTourism Society definition, it is estimated that around 30 million international travellers (or around five per cent of all international tourist arrivals) took an ecotourism trip in 1998. However, many ecotourism trips are domestic, and in the United States of America alone it is estimated that 20 million travellers took an ecotourism trip in 1998.

Regardless of the size, the trend is up, with ecotourism being particularly prominent in tourism's fastest-growing markets, such as Southern Africa and Latin America. It even dominates in some markets. Kenya estimates that eight out of ten visitors come for wildlife, as do most in Costa Rica, although not all might be true eco-tourists.

The World Wildlife Fund for Nature estimates that 20 per cent of the revenue generated from tourism in developing countries is due to ecotourism. It is also estimated that the return on land-use for ecotourism is ten times that of agriculture, thus attracting many developing countries to develop an ecotourism market.

The significance of nature as a resource for developing ecotourism can be illustrated by the case of Kenya. The Kenya Wildlife Service recorded a revenue of US\$ 24 million from wildlife tourism in 1990, and of US\$ 54 million in 1995. Twenty-five per cent of earnings are paid out to communities in areas adjacent to parks and reserves. A recent study of Amboseli National Park in Kenya determined that each lion there was worth US\$ 27,000 and each elephant herd was worth US\$ 610,000 in tourist revenue per year.

Structure of Supply

Ecotourism's biggest problem is labelling: going on an ecotour is no guarantee of good ecology. So far, only Australia has an accreditation system to rate tour operators and resorts on the basis of their greenness. Therefore, it is necessary for the individual traveller to undertake research to discover which ecotour operator most suits their needs, has the least impact on the host population and environment, and maximises the amount of money that goes directly to the local community and to natural resource conservation. Many operators have codes of ethics, and several organisations or bodies have drawn up checklists of questions to consider when choosing an ecotour operator.

According to the American Society of Travel Agents, the top destinations for US eco-tourists are: Central America, Southern America, Canada, the USA, the Caribbean, Antarctica, and Australia.

However, the popularity of destinations is very much dependent of the type of ecotour being sought. For whale watching, the Azores, Iceland, south-east Alaska, Baja California, and Japan are popular destinations, whilst for bird watching, eco-tourists are more likely to head for Uganda, Poland, Costa Rica or the Rift Valley lakes in Kenya.

Overall, the world's top destinations for ecotourism are considered to be Indonesia and Borneo, India, Venezuela, Galapagos Islands, Costa Rica, Canada, Antarctica, East Africa, and Madagascar.

Profile of Consumers

Main Target Segments: Dinks/Empty Nesters/Seniors

Eco-tourists tend to be relatively affluent, well educated, mature, and environmentally focused. They are usually experienced overseas travellers who typically travel alone with a purpose to see, experience and appreciate the natural environment.

They tend to be outdoor enthusiasts, older than 30, and are equally split between males and females. Nature tourists generally take longer trips and are willing to spend up to 10 per cent more for travel services and products than other travellers. Some studies show that visitors who rank nature-oriented activities as important spend nearly twice as much as non-nature-oriented visitors.

Around ten per cent of US travellers reported taking at least one ecotourism trip in 1998. One third of these (almost 40 million adults) said they are likely to take another eco-trip in the next three years.

Protected areas are the main reason for selecting a travel destination. Eco-tourists do not always seek quality food and lodging although they can afford it. Rather, their preferences reflect a belief that the facility where they are staying is not destroying the natural resource.

Future Trends and Prospects

With the growing public awareness of the environment and the need to protect it, the ecotourism segment will continue to grow in popularity over the next decade. It is estimated that the demand for ecotourism is growing by approximately 20 per cent annually in the international market. Destinations will look for opportunities within the segment to promote their product and benefit from this expanding market.

There are several examples of this already taking place, and the number of instances whereby ecotourism products are developed will continue to rise. With the decline of the German market (which accounts for 20 per cent of hotel nights and 42 per cent of camping guest nights) in Norway, the country is looking to develop its ecotourism product. Recent research shows that Norway is well situated to benefit from the growth of ecotourism as it encompasses all environmentally friendly factors such as fresh air, clean water, space, and unspoilt surroundings.

Brazil is planning a US\$ 200 million programme to develop ecological tourism in the Amazon. The project, which is being funded by the Inter-American Development Bank calls for 50 per cent of the funds to go toward financing private sector companies interested in investing in ecotourism in the Amazon region. The other half will be used to improve and expand the conditions for ecotourism. The growth of investment of ecotourism in Brazil is significant, increasing from US\$ 3 billion in 1996, to US\$ 8 billion in 1998, and US\$ 12 billion in 1999.

Venezuela has perhaps more potential for ecotourism than any other country. However at present, only a small percentage of its visitors travel for ecotourism purposes. Nevertheless, the Venezuelan Ecotourism Society has begun training programmes for guides and aims to increase awareness of ecotourism.

Cuba is entering the ecotourism market by declaring eight sectors in the north of the country to be protected areas, among them a huge Caribbean flamingo reserve.

Marketing of the Segment

Destinations and operators looking to target the ecotourism market should recognise the fragile balance between promoting tourism and maintaining the environment; attempt to produce goods and services that do not harm the environment; and adopt processes and procedures that are kind to the environment. A number of associations in several countries around the world produce a code of practice for ecotourism operators to follow.

Destinations and operators should also project an image that reflects a sense of environmental responsibility, and adopt the three "R"s of environmental consciousness: reduce, reuse and recycle.

It is important to educate travellers on the need to protect the environment, and thus ensure continued viability. Tours should strengthen the conservation effort and encourage greater appreciation of nature, conservation and the environment.

Communication with environmental groups should be maintained. Conferences or community business breakfasts that environmental groups co-sponsor offer opportunities to market tourism products.

4.5 Cultural Tourism

Definition

Cultural Tourism encompasses cultural activities and experiences that attract visitors and enhance their visit. Cultural Tourism is about immersion in and enjoyment of the lifestyle of the local people, the local area, and what gives it identity and character.

The International Council on Monuments and Sites (ICOMOS), which produced a Charter on Cultural Tourism in 1976, has defined Cultural Tourism with a less animated perspective. It suggests Cultural Tourism is that form of tourism whose object is, among other aims, the discovery of monuments and sites. It exerts on these last a very positive effect insofar as it contributes – to satisfy its own ends – to their maintenance and protection. This form of tourism justifies in fact the efforts which said maintenance and protection demand of the human community because of the socio-cultural and economic benefits which they bestow on all the populations concerned.

Size of the Segment

Cultural Tourism is growing in popularity faster than most other tourism segments, and certainly faster than the rate of growth of tourism worldwide. Whilst there are few hard statistics covering a global perspective, several countries have undertaken studies which show that arts and cultural activities are growing in popularity faster than the growth in visitor arrivals, and arts and crafts are tourists' most popular purchases.

The level of cultural tourism in a destination depends on the tourism product and the level of development of the cultural tourism product. For example, cultural tourism dominates tourism to Tasmania, with over 70 per cent of all visitors travelling to the island for some form of cultural tourism. In Spain, there is currently a swing from beach tourism to cultural tourism, with the industry rapidly adjusting to this change in tourism balance, although beach tourism still dominates the sector.

Germans took 6.7 million cultural holidays in 1997, with German tour operator Ikarus estimating that around 5 per cent of these are to long-haul destinations. Other European markets are smaller with perhaps only the French and UK markets reaching an annual level as high as 100,000 to 150,000 culture/heritage special interest trips outside Europe. In total, Europeans are calculated as taking around one million culture/heritage special interest trips a year to destinations in Asia, the Middle East, Africa and the Americas. North Americas may undertake a similar volume of such trips but most of these are to European destinations.

Whilst estimates vary, it is thought that around 10 per cent of all tourism arrivals worldwide are for Cultural Tourism purposes. In terms of volume, that equates to between 60 and 70 million tourist arrivals.

Structure of Supply

Whilst the scope of Cultural Tourism is large, there are several popular sub-segments, most notably: archaeology, architecture, art, church and cathedral tours, history tours, maritime museums, military history, music festivals, opera and pilgrimages. These sub-segments can be easily identified by their high profile representation in tour operator's brochures.

Cultural Tourism has been, in the past, principally the domain of independent or specialist tour operators, however, as the segment increases in popularity, some of the larger operators are including cultural tours in their brochures.

The appeal of Cultural Tourism to destinations developing their product is that it does not need to be limited to countries or regions which have a rich cultural history, such as the Holy Land, or southern Europe. Cultural Tourism can also focus on recent history, often through museums or experiences that bring history or a particular subject to life. Examples include the Black Country Museum in the United Kingdom that focuses on life in Britain in the early 20th Century. The museum has seen visitor numbers rise from 9,000 to 300,000 in 20 years. Areas that have become impoverished due to economic decline can also benefit, such as the opening of old coal mines as mining museums in Wales. The concept of naming Cultural Cities for Europe has also been launched to assist inner city regeneration as well as promoting the arts to an increasingly aware and interested traveller.

The growth of interest in Cultural Tourism has not, however, been limited to areas looking for regeneration or who do not have an obvious tourism product. Countries or regions rich in culture are exploiting the segment, even to the point whereby they are challenging each other to claim a slice of history. Two thousand years after Christ turned water into wine at the marriage in Cana, Kafra Kanna in Israel which has long been attracting thousands of tourists every year is now being challenged by Qana in Lebanon, pushing its own historical claim to the event. This outlines the importance of pilgrimages and religious cultural tours.

Profile of Consumers

Main Market Segments: Empty Nesters/Seniors

Typically, cultural tourists have a higher than average level of income and education. They tend to take longer trips, stay in hotels, and are interested in shopping. They are usually in the 45 to 60-year-old age group.

Cultural tourists tend to be well-travelled, and therefore are constantly looking for new destinations. They generally expect good quality accommodation, though for many the lure of the special interest overrides the requirement when the site offering the attraction can only provide more modest facilities.

There is also a growing segment of youth visitors, travelling for educational purposes. Whilst school or college visits are increasingly common at cultural sites, a large proportion will constitute domestic tourism, although overseas educational visits are increasing.

Most culture/heritage tourists share with the ecotourist a genuine interest in the society and culture of the places they visit, and are largely motivated by a quest for knowledge presented in an accessible (and generally entertaining) form.

Future Trends and Prospects

It is predicted that the market for Cultural Tourism will swell as the baby-boom generation matures. This growth in Cultural Tourism will be boosted by destinations developing their tourism products to cash in on the growth of the segment. Philadelphia in the United States has found that for every dollar it spends on its cultural tourism industry, \$55 was returned in new economic activity. Philadelphia's major thoroughfare has been transformed into the city's Avenue of the Arts attracting new cultural attractions, restaurants, and businesses along the way. Increasingly, other destinations will look at developing a cultural tourism product in the same way to attract tourists.

Since 1972, UNESCO has been itemising the world's greatest cultural and natural sites. At present there are 690 listed sites around the globe, with the number increasing every year. Of the sites included, 30 are currently listed as World Heritage Sites in Danger, and these include Angkor Wat in Cambodia, Timbuktu in Mali, Bahla Fort in Oman, and the city and fjord area of Kotor in Yugoslavia. With the increasing awareness of UNESCO heritage sites and their cultural importance, demand to visit the sites, especially those in danger, will increase, boosting the overall growth of Cultural Tourism worldwide.

The English Tourism Council reports that spending at England's 2,001 historic buildings and ancient monuments open to the public rose 4 per cent to US\$ 390 million in 1998, despite a 1 per cent fall in visitor numbers to 70 million. However, falling interest in visiting stately homes and public gardens is a result of the fashion to be futuristic with everything geared to the new Millennium. English Heritage reports a more "interactive" approach to attracting tourists to its 400 plus properties, including staging historical battle re-enactments, plays, open theatres, and more child-driven events.

Marketing of the Segment

According to the Los Angeles Convention and Visitor's Bureau, it will be soon evident that destinations with cultural tourism programmes will have an effective edge over those that rely on traditional approaches to tourism marketing.

All destinations, whether they are urban centres or rural villages, have cultural assets to be proud of, and a story to share with visitors. The key is to define what is unique about the destination in question, and to give the visitor an opportunity to pass on knowledge and experience the character and traditions of the destination.

It is important to involve the community with Cultural Tourism development, with the identification of the product, and also to build awareness of the product. Cultural Tourism can be a tool for strengthening ties within a community as well as attracting new business.

4.6 Urban Tourism

Like its counterpart rural tourism (see next), urban tourism embraces many different specialist sub-segments of tourism (e.g. short breaks, culture/heritage, sports, nature-based), so are relevant both from the viewpoint of image building and reinforcement to provide the positive framework for marketing of sub-market segments, as well as providing a general interest visit or touring circuit.

Definition

Urban Tourism refers to trips taken by travellers to cities or places of high population density. The duration of these trips is usually short (typically one to three days), and therefore it can be said that urban tourism is closely linked to the short-break market.

Size of the Segment

Whilst urban tourism is significant in Europe, due to the large number of cities, their close proximity, and high population density, it is also a big industry in the United States, the Far East and Australia. Urban tourism has only a small role to play in Africa's tourism industry.

The main problem with defining the size of urban tourism worldwide is that a large number of tourists combine urban tourism with another form of tourism, such as a beach holiday. It is not uncommon for tourists to spend one day of their holiday to a beach resort visiting a nearby major city for shopping or sightseeing purposes.

However, it is estimated that over 60 per cent of all international tourists in 1998 were at some point in their travels urban tourists. That amounts to around 380 million tourists.

Structure of Supply

Cities became aware of themselves as tourist attractions in the early 20th century, and since then urban tourism has provided a welcome economic boost to those that have experienced a decline in established economic activities. Other benefits of urban tourism include the revitalisation of city centres, the physical regeneration of cities, and the development of tourist facilities that can be used by residents as well as tourists.

A large number of specialist city-break tour operators have been established in the main tourism generating markets of Europe and the United States. They usually offer flights and accommodation, but sometimes include admission to attractions within the city. The growth of urban tourism has attracted many of the large mainstream operators who now include city breaks in their brochures, alongside their summer sun products.

A number of surveys have been undertaken to establish the most popular urban tourism destinations. Overall, the top five most popular in terms of the quality of the product (as opposed to visitor numbers) are Paris, New York, San Francisco, Venice and Sydney.

Profile of Consumers

Main Market Segments: Dinks/Families/Empty Nesters/Seniors

Urban tourism appeals to a broader band of the tourism market than perhaps any other. Dinks are most commonly attracted for sightseeing and nightlife, families for city attractions such as theme parks and museums, and empty nesters and seniors for cultural attractions.

This broad band also brings with it vastly different spending patterns, ranging from those staying in budget accommodation to those staying in five-star hotels. Dinks and seniors tend to seek a higher grade of accommodation than empty nesters and families.

The Dinks are generally time poor/cash rich, and are a particularly important segment of the market as they are high spenders and will seek destinations that can be easily accessed.

Future Trends and Prospects

With the birth of the low cost airlines in Europe, and their subsequent network expansions throughout the continent, city breaks will become increasingly popular as the cost of transport decreases. Fares of \$100 return between European capitals is now commonplace, and consequently travellers are finding themselves spending more on car parking at airports than on the flights to the destinations themselves.

European destinations will adjust their marketing strategies to attract the short stay urban tourist. Some tourism organisations, such as the Spanish Tourist Board, are already re-marketing themselves to attract the new influx of urban tourists.

Tourists are travelling further than ever before to visit cities for short breaks. Whilst the European market has typically travelled for less than two hours flying time for a city break, there is now a growth in popularity for trips further afield. Urban tourism visits from Western Europe to New York, Moscow, Jerusalem, and cities in North Africa such as Morocco and Tunisia are commonplace.

Urban tourism is expected to receive a boost from the introduction of the euro currency in the year 2002. In particular it will encourage tourists to travel across borders from one city to another without the expense or inconvenience of exchanging their money for another currency.

There will be a continued growth in the popularity of multi-centre urban tourism. This involves the tourist visiting more than one urban centre during their trip. Multi-centre trips tend to combine cities with similar histories, such as Vienna and Budapest, or with diverse attractions such as Paris and Nice.

Marketing of the Segment

Due to the rather broad nature of the urban tourism market, destinations must carefully undertake an in-depth inventory of their tourism product, and then determine which markets this product will appeal to prior to embarking on a marketing campaign.

Access is particularly important, especially for the Dinks segment who are time poor but cash rich. They will seek destinations that can be accessed by direct flights or rail links, and have a high proportion of attractions within their urban settings.

Use of the Internet as a marketing tool and promotional medium is essential for the urban tourism market, especially for the facility to search for accommodation establishments and allow booking to take place online.

4.7 Rural Tourism

Definition

Tourism is termed Rural Tourism when rural culture is a key component of the product on offer. Tourism activities revolving around large holiday home developments, big hotels, golf courses or ski pistes are difficult to integrate into the concept of rural tourism.

The distinguishing feature of tourism products in rural tourism is the wish to give visitors personalised contact, a taste of the physical and human environment of the countryside and, as far as possible, allow them to participate in the activities, traditions and lifestyles of local people.

Rural Tourism includes agri-tourism, which refers to tourism on the farm. Agri-tourism enables farmers to diversify their activities while enhancing the value of their products.

Size of the Segment

Despite the fact that international tourism is growing worldwide at an annual rate of around four per cent, mass tourism has run into a number of difficulties – significantly, tour operators unable to satisfy demand among customers weary of over-crowded holiday resorts and keen to discover new regions and their inhabitants. This is a high potential market slot for rural tourism provided that the products that it offers respond to the aspirations of this group of tourists.

As there has been little research into the size of the rural tourism segment, and also because the size of the segment is dependent on the precise definition of rural tourism, it is difficult to estimate its size in terms of tourist arrivals. However, tourists travelling internationally for rural tourism purposes are thought to be around three per cent of all international tourist arrivals worldwide, or around 19 million in 1998. However, the receipts generated from rural tourism are estimated to be considerably less proportionately.

Rural tourism is estimated to be growing at an annual rate of around six per cent, two percentage points above the growth rate for all tourism.

Agri-tourism makes up a very small part of rural tourism (around two per cent of the turnover of rural tourism) and agriculture (0.3 per cent of agricultural turnover). Since the development of agri-tourism in the 1980s, the number of participating farms has doubled in countries such as Italy, the United Kingdom and France where the number of agri-tourism accommodation units exceeds 600,000.

The percentage of farms offering some kind of tourist accommodation stands at eight per cent in (west) Germany and the Netherlands, four per cent in France, and two per cent in Italy. The countries with the highest percentages are Austria, where the proportion exceeds 10 per cent, and Sweden and Switzerland where it reaches 20 per cent.

Structure of Supply

Despite the potential of rural tourism, the range of products on offer is still relatively limited. Apart from certain reservation networks for rural accommodation, there is still little structured rural tourism visible on the market, with only a few specific rural tourism operators with a catalogue of products.

Spain and Ireland are two countries that have made significant efforts to promote their rural tourism product. In Spain a variety of organisations are promoting the charms of areas not usually featured in holiday brochures. The people behind these initiatives are often couples who have left jobs in the city to pursue dreams of rural living. They frequently offer short courses in local cooking or crafts and provide expert advice on the range of activities available in the vicinity. Properties range from basic to luxurious, but prices tend to be low compared with mainstream self-catering or hotel holidays.

In Ireland, the development of rural tourism has been encouraged by the introduction of the National Rural Tourism Awards, annually awarded to establishments with the best rural tourism product.

Profile of Consumers

Main Market Segments: Families/Empty Nesters/Seniors

There is a strong cultural and educational element in rural tourism, and studies conducted on the profile of consumers show that the majority of enthusiasts are mainly from the middle or upper classes, and attach great significance to local values and the local cultural identity.

Rural tourism products tend to be sought by families, usually with children between the ages of five and eleven, and by couples between the ages of 50 and 65. The former are often attracted by the prospect of staying close to animals on a farm, whilst the latter for the rural qualities such a vacation offers.

Future Trends and Prospects

The growth of rural tourism is expected to continue, although there is not expected to be a massive shift of tourists towards this segment. However, there are sections of the mass tourism market which are looking for a more customised holiday away from the major resorts, and it is this segment that is likely to be attracted by rural tourism products.

There will be a significant growth in the number of products made available to the rural tourist over the next five to ten years, varying from renovated old farmhouses in northern and southern Europe to coastal villas in undeveloped seaside locations.

Another aspect of rural tourism is farmers markets. The growth of farmers markets will continue to spread throughout Europe. Farmers markets were first started in the USA around the mid-1970s as a reaction to the difficult farming situation. A group of growers drove into town and set up a stall to sell their produce to the locals, and soon this became so popular they set up a proper market.

Marketing of the Segment

To successfully market the rural tourism segment, the product must be in keeping with the expectations of the traveller. At present, the range of products on offer do not yet match the volume level required. To market the segment successfully it is important to meet a number of criteria desired by the rural tourist, including:

- Desire for independence (accommodation must be small (sleep less than 15 persons), with access for own car transport);
- They search for a certain "style", authenticity, and not for the archetype welcome received in the hotel industry;
- Attracted to holidays offering a "content", intellectual discovery and contact with local people; and
- Their demand is strongly oriented towards tourism with short stays, either long weekends or for a maximum of one week.

Care must be taken to avoid too narrow a product focus. There is not just one type of customer or one growth market, but segments of the market which each require an individual approach.

4.8 Cruises

Definition

Cruising tourism refers to time spent on a waterborne vessel for leisure purposes. Within the tourism industry, the term “cruising” is generally assumed to mean sea cruising. This tends to imply trips during which the passenger is primarily based on a vessel that travels to a number of destinations where they disembark for short periods to visit land based sites. The vessels are generally fully equipped with entertainment and sporting facilities, and passengers are provided with full-board style accommodation.

Cruising can also imply travel on smaller vessels, such as flotilla sailing, junk cruising, river cruising, bare-boat or skippered yacht sailing, or yacht charter. However, this market segment report mainly focuses on sea cruising.

Size of the Segment

There were over 7.5 million cruise passengers worldwide in 1998. Almost six million of these were from the United States. Passenger growth over the period to 2005 is expected to be an additional six million passengers.

The cruise industry generated a total economic impact of US\$ 11.6 billion in the United States in 1997, a figure that could reach US\$ 18.3 billion in 2002. Direct spending by cruise lines and their passengers came to US\$ 6.6 billion, including US\$ 1.8 billion on air travel and US\$ 1.2 billion on other transportation services.

The Caribbean and the Bahamas remain the leading markets for cruise lines in North America, with more than 42 per cent of the capacity in 1999. That is two percentage points down on 1998, but still twice that of Europe which weighed in at 20 per cent. Alaska ranked third with 9 per cent, followed by the Panama Canal, the Pacific coast of Mexico and Bermuda.

Structure of Supply

The demand for cruise ships is on the rise with 48 new-build contracts worth US\$ 14.6 billion to be fulfilled by 2003. The larger cruise lines – Carnival Corporation, Royal Caribbean International, and P&O Princess Cruises are the dominant players claiming 64 per cent of the new capacity in 1999.

The cruise industry has diversified considerably in the last five years with several large tour operators and the Disney Corporation entering the market. These have been important factors in the growth of the sector. In particular, the consolidation of tour operator’s involvement in the cruise sector, together with increased cruise marketing including the popular cruise-and-stay concept, is boosting demand for the Mediterranean.

There are an increasing number of cruise vessels entering the market, with the trend being the building of larger vessels. Of the 48 cruise ships currently under construction, 30 are over 60,000 tonnes (1,200 passengers).

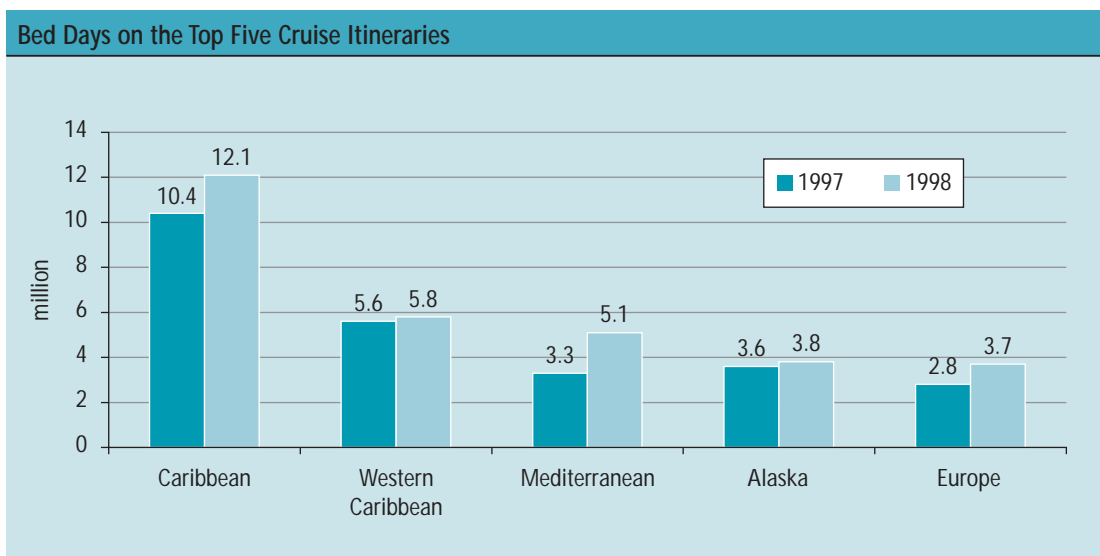
Many destinations that are developing their tourism product or are in the process of establishing themselves as world tourism destinations often try to attract cruise vessels to call at their ports. Although revenue is not generated through accommodation, arriving visitors do tend to spend money in the local markets and souvenir shops. Cuba is currently attracting cruise ships to its waters, and other emerging destinations, such as Libya, are looking at the possibilities.

A Maltese led consortium is looking to construct the biggest cruise line terminal in the world in Valleta Harbour, Malta. This would help the island attract the leading and largest cruise ships.

Specialist cruises to otherwise generally inaccessible locations, or locations that are difficult to reach by land, are a niche market but have still experienced significant growth in recent years. Trips tend to be expensive, with prices of between US\$ 3,700 to US\$ 8,700 for three weeks.

Passengers will be able to ice skate in the Caribbean when the world's largest cruise ship is launched in November 1999. The 3,100 cabin Voyager, of Royal Caribbean Cruise Line, will boast the first ice-skating rink and climbing wall on a cruise ship. The unusual facilities are part of the company's plan to attract younger clients.

The world's top five cruise itineraries are the Caribbean, Mediterranean, Alaska, and Europe. All have shown a large increase in the number of bed days sold in 1998 over 1997, although the Mediterranean and Europe show the largest increases.



Profile of Consumers

Main Target Segments: Dinks/Families/Empty Nesters/Seniors

The demand for cruises has become more diverse, with many tour operators entering the market at all levels, offering a wide range of products. Distinct types of cruise markets include family cruises, all-inclusives, luxury liners, weddings, and themed cruises. Each type of cruise attracts a specific market type, and with all markets currently showing strong growth, operators are able to position themselves in the market they think will be most appropriate for themselves, and most profitable for their operation.

Cruises are fast attracting the family market as parents catch on to the fact that, compared with land-based vacations, cruising is remarkably hassle-free. Catering for this market, the latest generation of ships have children's facilities on-board, ranging from teen discos to virtual reality centres that put many land-based resorts to shame.

The majority of all-inclusive cruise ships are small, luxury vessels, and consequently attract the empty nesters or seniors markets, that is those people with high disposable income.

Luxury Liners are generally smaller than mass-market ones, carrying just a few hundred passengers. Prices are high, and consequently clients tend to be empty nesters or seniors.

Getting married on-board ship is a growing trend for couples looking for a different way to spend their wedding day, prices start from around US\$ 2,900 and therefore are considerably cheaper than an average wedding at home.

Themed cruises attract travellers from a wide range of age groups, and therefore target markets vary depending on the theme of the cruise. Many themes are based upon activities or destinations that can be visited on the cruise, such as art, dancing, or golf. Travellers tend to be dinks, empty nesters, or seniors.

Specialist operators, such as Abercrombie and Kent, Arcturus Expeditions, Cruise People, and Cox and Kings Travel offer trips to specialist destinations such as Antarctica, Galapagos, Greenland and Iceland, and the Chilean Fjords. Typical expedition passengers pride themselves on their dislike of conventional cruises. Certain ships, such as the Caledonian Star, have a particularly loyal following. Retired people are in the majority because of the cost involved. Most have chosen the cruise because they want to visit remote islands that are inaccessible by other means, but many are reluctant to risk the uncertainties of land trips.

Future Trends and Prospects

High growth rates of persons taking a cruise (of around 10 per cent per year) are expected over the first half of the next decade. Cruising will become increasingly established in many diverse sectors, such as the mass holiday market, youth and senior citizens markets, and specialist markets such as educational cruises to unusual destinations (including the Arctic and Antarctic).

The Caribbean will continue to be the most visited destination, receiving over 50 per cent of passengers, followed by Alaska and the Mediterranean with around 10 per cent each. The total number of cruise passengers worldwide is expected to grow from 7.5 million in 1998 to 13.5 million by 2005.



Annual passenger numbers in the Mediterranean are expected to increase from one million in 1998 to 1.2 million in 2000, 1.5 million in 2002, and almost 2 million by 2005.

There will be the continued commissioning of mega-ships, upward of 100,000 tonnes, capable of accommodating between 3,400 to 4,000 passengers.

The polarisation of the cruise industry will continue, with the top lines expanding at the expense of the smaller lines.

There will be a fall in the average age of cruise passengers to 25-39, with incomes ranging from US\$ 30,000 to US\$ 100,000. There will also be an increase in the number of couples taking cruises with children.

There will be an adoption of measures, similar to those enforced in Bermuda, to protect destinations against over-capacity. Bermuda has the highest cruise passenger head tax of any country, at US\$ 60, and actively limits cruise ships.

A key challenge for the future will be the ability of cruise lines to retain qualified workers.

Accompanying the expansion of fleets by major cruise lines is the development of private islands. Several cruise lines already have their own private islands, such as Royal Caribbean International's Coco Cay in the Bahamas.

Tighter security and looser visa restrictions will be two main requirements for cruise tourism growth in the Middle East region. Stringent and visible security is vital to build consumer confidence as the popularity of the region increases and many of the ports in the Gulf and Indian Ocean are keen to develop cruise tourism.

Finally, there is strong growth in the popularity of river cruising, with the number of people taking a river cruise having tripled in the last five years. This growth in river cruising is expected to continue, with the top five rivers being the Nile, Rhine, Neva and Volga in Russia, Danube, and Yangtse in China.

Marketing of the Segment

It is essential for each cruise ship or individual cruise to be targeted at a selected market, and for the vessel to be equipped for and the itinerary to be appropriate to that market. This was highlighted when Disney launched its first cruise ship. Carnival Cruise Lines (who have an established family product) immediately upgraded its facilities for children on its family cruises to fight this market threat.

The development of themed cruises can also provide a market advantage. Themed cruises, an established feature on board P&O Cruises and Cunard Line, are starting to be developed by other operators. It is generally accepted that where people are undecided, an attractive theme can be the catalyst to make them book. Fred Olsen Lines' brochure features antiques, architecture and history cruises. Children's cruises are also available. P&O offer a wide range of themed cruises, including classic cars, line dancing, wine appreciation, sports and Olympic heroes, and garden cruises.

Competition for high spending cruise passengers with a taste for the exotic is driving cruise lines to seek more offbeat locations. Diversification into destinations such as Vietnam, China and New Zealand is helping cruise lines give their products a higher profile in the market place.

The importance of destinations on cruise liner itineraries is highlighted with the recent growth of cruise-and-stay trips, which include a cruise followed by a few nights stay in a specific destination. Kuoni expects its new cruise-and-stay programme to boost sales by 35 per cent.

4.9 Theme Parks

Definition

Themed tourism is tourism with a relatively narrow focus, where trips are motivated by an interest in a particular subject. Often the location is a secondary matter, a background for the theme. Themed tourism includes theme parks, health tourism, industrial tourism, wildlife tourism, religious tourism, etc.

In this market segment report, the focus is on theme parks. Theme parks are specific, purpose built attractions which generally focus on a specific theme and base a range of amusements or experiences (such as rides, shows, restaurants and bars) around this theme. Theme parks may not necessarily be purely for leisure purposes, but may be for education or providing information (albeit often in a fun or easily accessible format).

It is generally acknowledged that the concept of a theme park began with the realisation of Disneyland at Anaheim, California in 1956. A year previously, Walt Disney put forward his idea of constructing a new amusement park in which all the rides and attractions would be themed or related to his film characters.

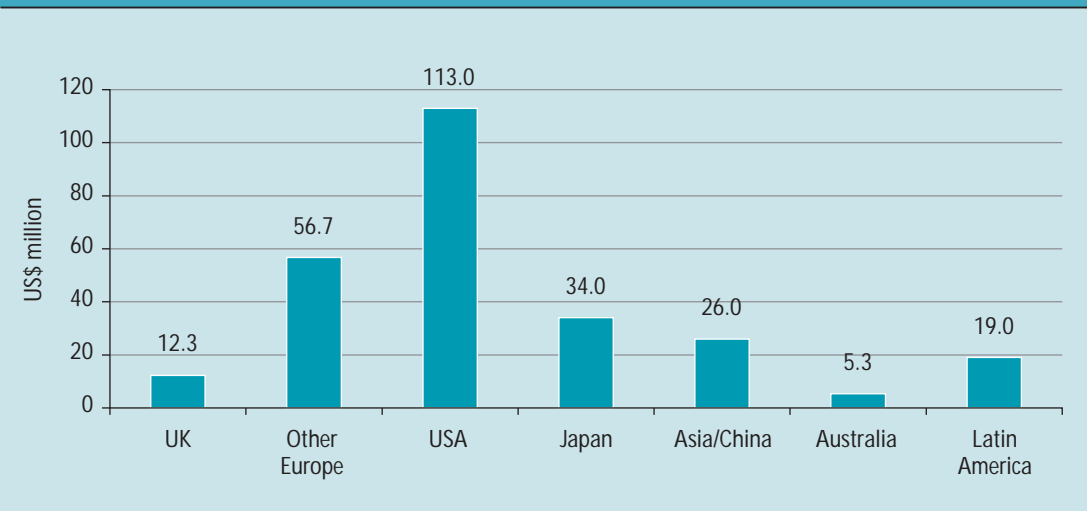
Size of the Segment

Whilst it is difficult to define exactly the number of theme parks worldwide, principally due to the problems with defining exactly which attractions to include in the list and which ones to exclude, it is estimated that there are around 320 globally. Of these, 200 are in the United States of America, 60 in Europe, 25 in Canada, 15 in Southern America, and 20 in Asia, Africa and Australia.

In 1997, it is estimated that there were around 266 million visitor arrivals at theme parks worldwide. The United States, being home to over half of all the world's theme parks, not surprisingly attracts more visitors than any other country. Annual visitor numbers are over 100 million, with the major players being Disneyland and Universal Studios Hollywood in California, and Walt Disney World and Universal Studios in Florida.

Growth of visitor arrivals at theme parks currently stands at around eight per cent per year. Almost US\$ 4.7 billion was spent in theme parks worldwide in 1997.

Estimated Theme Park Admissions in 1997



The World's top five theme parks attracted almost 70 million visitors in 1998, and all five belonged to the Disney Corporation.

Table 4.9.1 The World's Top Five Theme Parks, 1998

Theme Park	Attendance (million)
Tokyo Disneyland (Japan)	16.7
The Magic Kingdom, Walt Disney World, Florida (USA)	15.6
Disneyland, California (USA)	13.7
Disneyland, Paris (France)	12.5
Epcot, Walt Disney World, Florida (USA)	10.6

Source: Amusement Business

In Europe, Disneyland Paris attracted 12.5 million visitors in 1998, with the park bringing in around four per cent of the French tourism industry's foreign currency earnings. Disneyland Paris has been instrumental in the large increase in visitor numbers to many other theme parks in Europe over recent years, as many people visit the park, enjoy it, and then look for other alternatives (often closer to where they live). Other top European theme parks are Parc Asterix (1.7 million visitors in 1998), Port Aventura (2.7 million), Efteling (2.7 million), Futuroscope (2.7 million), and Phantasialand (2.1 million).

Structure of Supply

The Walt Disney and Universal Studio kingdoms on the East and West coasts of the United States have been instrumental in the development of theme parks worldwide, and they are still the best known, most visited, and also amongst the most impressive theme parks in the world.

Florida has been called "the land where theme parks grow", and Universal Studios' new Islands of Adventure park brings the total number of theme parks in Orlando to seven. There seems to be no end in sight for Orlando's growth as the ultimate theme park destination. Each new destination begs the question of whether it will draw in new visitors or simply recycle existing ones from other parks. However, with visitor numbers on the increase, there appears to be good grounds for this increase in supply.

Whilst some theme parks are merely large fairgrounds, most new parks being developed today or in recent years are based around a "theme". Examples in the United States include Santa's Workshop: a Christmas themed park based in the North Pole; Camp Snoopy: based on the Peanuts cartoon characters; Ponderosa Ranch: a movie set western town; Sesame Place: based on the Sesame Street TV programme; and Stagecoach Stop: a reconstruction of a 1800s American village.

In developed markets (United States, Japan and Europe), the gulf between the big and small is becoming greater than ever. There has been massive consolidation in the United States; Busch Entertainment has bought Seaworld, and Premier Parks has bought Six Flags, some smaller US parks, and entered the European market with the purchase of the Walibi group of parks. The market continues to expand but the cost of buying into the market seems to be growing faster.

Profile of Consumers

Main Target Segments: Youth/Dinks/Families

Theme park visitors are most commonly families, that is one or two parents accompanying (on average) two children between the ages of 5 and 15. However, there are also significant numbers of couples and groups visiting theme parks who do not yet have children.

There does not appear to be any uniformity of income levels or educational background for theme park visitors. There are some trends that are specific to certain theme parks (often those with a strong theme, such as science theme parks), but overall theme parks tend to be enjoyed by a wide cross-section of visitors.

The emergence of theme parks and their subsequent popularity has introduced a new trend of families taking short breaks. The short break market used to be principally focussed on couples, however there are now increasing numbers of families going away for a weekend or short break to celebrate a birthday or as a treat for their children.

Future Trends and Prospects

Europe has entered an age of extreme theming. Theme restaurants and theme hotels, well established in the United States, are being introduced into Britain and several other European countries as fast as developers can find sites for them. The biggest challenge to the industry in Europe is finding land for parks – a problem not experienced in the United States.

Several of Europe's existing theme parks are expanding their attractions, and many parks are extending their opening seasons. In 1999 the Dutch theme park, Efteling, opened for the winter season for the first time in its 47 year history. Euro Disney has announced it will build a second attraction in France, adjacent to its Disneyland Paris site. The US\$ 640 million Disney Studios park will use cinema, television, film and animation as themes and will double as a working studio. The park will open in 2002 and officials expect 4.2 million visitors in the first year.

Only three years after the first European Warner Bros. Movie World opened its gates in the German town Bottrop Kirchhellen, construction started on another Warner Bros. Movie World near the Spanish capital Madrid to be opened in 2002.

Disney is opening a second theme park at the site of Disneyland in California. Called the California Adventure, the park will open with a 700 room hotel in 2001.

On Lantau Island in Hong Kong (China) work is underway on a Disneyland theme park scheduled to be opened in 2005. International and domestic attendance is anticipated of over 5 million in the park's first year of operation, rising to 10 million after about 15 years. Hong Kong Disneyland is expected to attract 3.4 million incoming tourists (including 1.4 million additional international tourists) in its first year, rising to 7.3 million (including 2.9 million additional tourists) after 15 years.

A great adventure theme park called Hopi Hari was opened in Sao Paulo, Brazil at the end of 1999. The US\$ 130 million park has 35 rides and is family themed.

The growth of the industry in Europe is likely to be different to that in the United States. In Europe, there is likely to be more of the French approach in creating urban science parks, which have an educational component to them as well as entertainment, and far fewer big, rambling, open air parks. The industry in Europe is currently at an interim stage. In the next five years, every country in Europe is likely to end up with four or five traditional theme parks. Then there will be an emergence of new types of parks, like the urban parks and "brand-land" parks (corporate parks such as Legoland tied closely with a particular company or industry). There will be far greater modulation of project types, in a denser area.

Everyone will be trying to duplicate the Disneys and the Universals with fantastic theming. There will be a shift away from the roller coaster and riding. More theming will be brought into parks, just as the animal safari at Disney's Animal Kingdom is not simply a tram tour to see the animals. They put the visitor on a safari and there is a plot and action. Theme parks in the future will try to achieve that sort of realism, grab the visitor's attention, and keep their attention.

New developments which will reflect this are the proposed theme park based on Thomas the Tank Engine to be opened in the United States, a Woodstock theme park aimed at capturing the counterculture spirit of the famed Woodstock music festival, a recently opened Jungle Crocs of the World park based around crocodiles in Florida, and a theme park based on wine for adults, called Vinopolis, in London.

The trend, especially in Europe, of declining leisure time will ensure the strong growth in visits to theme parks is maintained, as people will seek destinations packed with activities in a condensed area. The growth in the number of family short breaks, and also midweek breaks, will ensure that the principally family market will expand substantially in the next decade.

Marketing of the Segment

Despite the growth in popularity of theme parks, there is still a need for new parks to differentiate themselves from other existing theme parks in order to attract the visitor. Themes based on cartoons or television programmes can generate a great deal of interest but only remain attractive as long as the theme is popular. So it is important that chosen themes are sustainable.

Theme parks can be a catalyst for the growth of new destinations based solely on thematic leisure, as has been demonstrated in Orlando. Consequently, theme parks provide an opportunity for destinations or regions to generate or regenerate their tourism industry.

Facilities such as on-site or close-by accommodation are also considered to be important. The control of visitors to ensure minimum queuing or waiting time is also essential. One of the major theme park build/design companies is now planning several attractions that will virtually eliminate waiting lines.

4.10 Meetings and Conferences

Definition

Meetings and Conferences are part of what has become known as the MICE (Meetings, Incentives, Conferences and Exhibitions) segment. Meetings and Conferences also fall under the general umbrella term of Business Tourism.

Meetings and Conference Tourism refers to the activities of persons travelling to a country for which the main purpose of their visit is to take part, or accompany someone who is taking part, in a meeting or conference.

Size of the Segment

The International Congress and Convention Association (ICCA) publishes data on the meetings of international associations. For inclusion in the ICCA database, meetings must attract at least 50 participants, must be organised on a regular basis (i.e. not one offs) and must move between four different countries. A second set of data is published by the Union of International Associations (UIA) according to a different set of criteria to those of ICCA, i.e. minimum 300 participants, minimum 40 per cent foreigners, minimum representation of five nationalities, and minimum duration of three days. These differences lead to some changes in destination ranking.

The USA holds more meetings than any other country worldwide, with 7.3 per cent of the market in 1998. It is followed by the United Kingdom, Spain, France, Germany, Italy and Australia. The top five countries share of worldwide international meetings in 1998 was as follows according to ICCA data:

United States of America	7.3
United Kingdom	6.1
Spain	6.0
France	5.0
Germany	5.0

Almost 30 per cent of all international meetings worldwide were held in one of the top five countries.

The overall size of the meetings and conferences segment worldwide is difficult to determine, with each country attracting different levels of this type of tourism. However, it is estimated that around 20 per cent of all international tourist arrivals are for meetings and conferences, that was around 127 million in 1998.

Structure of Supply

The UIA data places Paris as the leading 1996 venue for meetings of international and national organisations, followed by Vienna and London. The ICCA data indicate that Madrid is the leading city by numbers of events, while Amsterdam leads the way in terms of participants.

All these destinations provide a product that has been developed to suit the meetings and conferences segment, that is: good quality and ample accommodation, and conference facilities for a range of different sized groups.

Table 4.10b Number of Meetings of Top 20 Cities, 1996-1998

Rank	City	1996	1997	1998
1	Madrid	33	46	76
2	Vienna	60	44	75
3	Copenhagen	76	41	65
4	Paris	50	47	46
5	Amsterdam	50	47	46
6	Stockholm	45	36	42
7	Singapore	27	21	42
8	Lisbon	25	23	40
9	Jerusalem	46	22	39
10	Barcelona	51	52	38
11	Helsinki	39	36	35
12	Seoul	29	29	34
13	Budapest	60	29	33
14	Edinburgh	31	34	33
15	Sydney	35	46	30
16	London	36	50	29
17	Melbourne	29	25	27
18	Berlin	26	20	26
19	Taipei	16	23	26
20	Brussels	27	31	25

Source: The International Meetings Market, 1991-2000, ICCA

Table 4.10c Total Number of Participants at International Meetings of Top 20 Cities, 1996-1998 ('000 Participants Rounded)

Rank	City	1996	1997	1998
1	Amsterdam	51	37	80
2	Berlin	18	35	48
3	Paris	55	52	47
4	Madrid	20	26	37
5	Montreal	-	-	37
6	Nice	12	-	36
7	Barcelona	53	48	35
8	Vienna	50	42	33
9	Jerusalem	30	16	33
10	Geneva	15	13	31
11	Manila	23	17	30
12	Lisbon	20	13	29
13	Stockholm	27	18	28
14	Singapore	17	24	26
15	Copenhagen	40	28	25
16	Seoul	27	23	23
17	Sydney	34	48	22
18	Helsinki	13	12	19
19	Brussels	13	21	18
20	Edinburgh	18	16	17

Source: The International Meetings Market, 1991-2000, ICCA

Value

The meetings and conferences segment is characterised by high quality, high spending and high yield visitors. In the United Kingdom, meetings and conference visitors spent an average of US\$ 186 per day in 1998, compared to only US\$ 73 per day for leisure travellers. Conference delegates spent US\$ 1060 per UK visit in 1998, which is some 2.5 times greater than holiday visitors. The meetings and conference segment is worth approximately US\$ 6,5 billion a year to UK tourism, 10 per cent of the country's tourism earnings (foreign and domestic).

In the USA, the broader grouping of conventions, exhibitions, meetings and incentives was worth US\$ 83 billion in direct spending in 1994, accounting for one-third of the hotel sector's turnover, and for 22 per cent of airline operating income.

Future Trends and Prospects

Meetings and conference tourism complements leisure tourism in so far as it facilitates or shares the same infrastructure and delivers added benefits to leisure visitors and the local community. Also, because of its wide geographical spread and year round activity, it can bring more business to leisure destinations, extending seasons and sustaining full-time employment in resort areas.

Research also shows that business tourism leads to growth in leisure visits, with approximately 40 per cent of meetings and conference visitors returning with families, colleagues or friends. Business tourism creates employment too, usually with high calibre, quality jobs with skills that can respond to complex personal and technical service demands of business travellers. In addition, during economic downturns, meetings and conference travel is more resilient than other sectors, maintaining higher levels of employment and investment.

For most or all the above reasons, many destinations are attempting to develop their meetings and conference market, and consequently this market is likely to experience a growth rate of at least 10 per cent per annum over the next ten years.

Despite the continued threat of video conferencing, and the use of the Internet to hold conferences, either with or without visual link-ups, the growth of the meetings and conference market seems assured.

Marketing of the Segment

Marketing destinations for the meetings and conference segment can be assisted by raising the profile of a destination by staging a major sporting or industry event, and also by being able to provide attractions in addition to the conference facilities themselves.

Raising the profile of a destination through the holding of a large sporting event (such as the Olympics) or a major trade show (such as an Expo) provides a significant marketing boost. Australia has become a popular destination for large international meetings and conventions because of the prestige associated with hosting the 2000 Olympic Games. This has helped move Australia up in the world meeting rankings. Sydney was moved up in the league table of most popular meetings-cities in the world as a consequence of the 2000 Olympics.

These increases in the popularity of Australia and Sydney are no coincidence. Spain and Barcelona felt a similar effect in 1992 when the Olympic Games were held there. Barcelona's convention visitor figures grew by 73 per cent in 1993, the year after the games, and both Spain and Barcelona are still enjoying the effects of the event.

The attraction of tourism products, in addition to the conference and accommodation facilities themselves, can be a large bonus to destinations marketing themselves to this segment. Most meetings and conferences allow delegates to spend time visiting the city or area in which their delegates are staying, and new, unique, or spectacular attractions help sell destinations for business tourism.

The development of new tourism products which can also cater for meetings and conferences also enable destinations to gain market advantage over their competitors. In Tasmania, Antarctic Adventure is a scientific and cultural indoor theme park operated by theme park firm Dreamworld. The attraction has a number of areas suitable for conference functions. Also in Australia, Captain Cook Cruises is launching the largest restaurant and sightseeing cruise ship ever built for Australian waters. The ship is expected to be very popular for small meetings and conventions.

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Visitor:

Any person who travels to a country other than that in which he/she has his/her usual residence but outside his/her environment for a period not exceeding 12 months and whose main purpose of visit is other than the exercise of an activity remunerated from within the country visited (Recommendations on Tourism Statistics - WTO/United Nations - 1993).

Tourist:

A visitor who stays at least one night in a collective or private accommodation in the country visited (Recommendations on Tourism Statistics - WTO/United Nations - 1993).

Same-Day Visitor:

A visitor who does not spend the night in a collective or private accommodation in the country visited (Recommendations on Tourism Statistics - WTO/United Nations - 1993).

Arrivals:

All data refer to arrivals and not to actual number of people travelling. One person visiting the same country several times during the year is counted each time as a new arrival. Likewise, the same person visiting several countries during the same trip is counted each time as a new arrival.

Receipts and Expenditure:

The figures on receipts and expenditure are given in current United States dollars. They exclude receipts and expenditure for international transport.

Intraregional Tourism:

Refers to arrivals of residents of any country of a particular region to any other country of the same region.

Long-haul Travel:

Refers to arrivals of residents of countries of one particular region to any country of any other region than their own.

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WTO Groupings of Countries and Territories

Africa

North Africa

Algeria
Morocco
Sudan
Tunisia

West Africa

Benin
Burkina Faso
Cape Verde
Côte d'Ivoire
Gambia
Ghana
Guinea
Guinea-Bissau
Liberia
Mali
Mauritania
Niger
Nigeria
Saint Helena
Senegal
Sierra Leone
Togo

Central Africa

Angola
Cameroon
Central African Republic
Chad
Congo
Democratic Republic of the Congo
Equatorial Guinea
Gabon
Sao Tome and Principe

East Africa

British Indian Ocean Territory
Burundi
Comoros
Djibouti
Eritrea
Ethiopia
Kenya
Madagascar
Malawi
Mauritius
Mozambique
Reunion
Rwanda
Seychelles
Somalia
Tanzania
Uganda
Zambia
Zimbabwe

Southern Africa

Botswana
Lesotho
Namibia
South Africa
Swaziland

Americas

North America

Canada
Greenland
Mexico
Saint Pierre and Miquelon
United States
Hawaii

Central America

Belize
Costa Rica
El Salvador
Guatemala
Honduras
Nicaragua
Panama

South America

Argentina
Bolivia
Brazil
Chile
Colombia
Ecuador
French Guiana
Guyana
Paraguay
Peru
Suriname
Uruguay
Venezuela

Caribbean

Anguilla
Antigua and Barbuda
Aruba
Bahamas
Barbados
Bermuda
British Virgin Islands
Cayman Islands
Cuba
Dominica
Dominican Republic
Grenada
Guadeloupe
Haiti
Jamaica
Martinique
Motserrat
Netherlands Antilles
Bonaire
Curaçao
Saba
Saint Eustatius
Saint Maarten
Puerto Rico
Saint Kitts and Nevis
Saint Lucia
Saint Vincent and the Grenadines
Trinidad and Tobago
Turks and Caicos Islands
United States Virgin Islands

East Asia and the Pacific

North-East Asia

China
Hong Kong (China)
Japan
Korea, Democratic People's Republic of
Korea, Republic of
Macau (China)
Mongolia
Taiwan (Pr. of China)

South-East Asia

Brunei Darussalam
Cambodia
Indonesia
Lao People's Democratic Republic
Malaysia
Myanmar
Philippines
Singapore
Thailand
Viet Nam

Australasia

Australia
New Zealand

Micronesia

Guam
Johnston Is
Kiribati
Marshall Is
Micronesia (Federated States of)
Kosrae State
Pohnpei State
Truk State
Yap State
Midway Is
Nauru
N. Mariana Is
Palau
Wake Is

Melanesia

Fiji
New Caledonia
Papua New Guinea
Solomon Is
Vanuatu

Polynesia

American Samoa
Cook Is
French Polynesia
Niue
Pitcairn
Samoa
Tokelau
Tonga
Tuvalu
Wallis Fut. Is

Europe

Central/Eastern Europe

Armenia
Azerbaijan
Belarus
Bulgaria
Czech Republic
Estonia
Georgia
Hungary
Kazakhstan
Kyrgyzstan
Latvia
Lithuania
Republic of Moldova
Poland
Romania
Russian Federation
Slovakia
Tajikistan
Turkmenistan
Ukraine
Uzbekistan

Western Europe

Austria
Belgium
France
Germany
Liechtenstein
Luxembourg
Monaco
Netherlands
Switzerland

Northern Europe

Channel Islands
Denmark
Faeroe Islands
Finland
Iceland
Ireland
Isle of Man
Norway
Svalbard Islands
Sweden
United Kingdom

Southern Europe

Albania
Andorra
Bosnia Herzegovina
Croatia
Greece
Holy See
Italy
Malta
Portugal
San Marino
Slovenia
Spain
The former Yugoslav Republic of
Macedonia (TFYROM)
Yugoslavia

East Mediterranean Europe

Cyprus
Israel
Turkey

The Middle East

Bahrain
Egypt
Iraq
Jordan
Kuwait
Lebanon
Libya
Oman
Palestine
Qatar
Saudi Arabia
Syria
United Arab Emirates
 Abu Dhabi
 Dubai
 Sharjah
Yemen

South Asia

Afghanistan
Bangladesh
Bhutan
India
Iran
Maldives
Nepal
Pakistan
Sri Lanka

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Special Country Groupings

Mediterranean

Albania
Algeria
Bosnia Herzegovina
Croatia
Cyprus
Egypt
France
Greece
Israel
Italy
Lebanon
Libyan Arab Jamahiriya
Malta
Monaco
Morocco
Palestine
Slovenia
Spain
Syrian Arab Republic
Tunisia
Turkey
Yugoslavia

Indian Ocean

Australia
Bangladesh
Comoros
India
Indonesia
Kenya
Madagascar
Malaysia
Maldives
Mauritius
Mozambique
Myanmar
Oman
Pakistan
Reunion
Seychelles
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Appendix 3 Information Sources on Market Segments

Categories of Information Sources

In order to design and execute effective marketing programmes for these various market segments, the marketer needs detailed and up-to-date sources of information. Such information should cover: product and market developments and trends; consumer profiles/characteristics/media exposure; competitor strategies and activities.

Clearly, a special programme of market research tailored to the destination's or organisation's specific needs is the optimal approach, but these are costly and often cannot be justified or fall outside the financial means of the country's NTA or company. There are numerous sources of information – some available on a commercial basis, but many others which are free – which the assiduous marketer can access to form his assessment of a given tourist market segment. These include the following:

Activity Associations

Many pursuits and hobbies attract interested individuals into forming specialist bodies. Some of these involve themselves with training and standards (e.g. PADI in respect of diving); others arrange group-based activities and/or act as a source of clothing and equipment relevant to the activity; but all disseminate information to member lists. These lists form a potentially valuable marketing tool for the destination or operator targeting this field of activity because all individuals in the membership are potentially receptive to any marketing message having already been pre-screened by the very act of joining the activity association.

Activities as diverse as scuba-diving, lawn bowling, golf, tennis, photography, painting, canoeing, hang-gliding, walking/rambling, steam train spotting, and football supporters (and many, many others) attract groups of individuals to establish common interest organisations.

Specialist Publications

The 1990s have seen the growth of consumer publications specifically related to travel and tourism. While sales to consumers represent one stream of income for the publisher, the principal commercial justification for these magazines is advertiser income. Again, for the marketer the attraction is that the readership is pre-screened by buying the magazine. The stream of such publications has its origins in National Geographic magazine and now includes CondeNast Traveller, Wanderlust, Food and Travel, and Ecotraveller, all available at newsagents in the UK, with a corresponding range of titles in other significant tourist generating markets.

Consumer Newspapers and Non-Specialist Publications

The growth of holiday travel, and its increasing segmentation, has led to specialist travel features being included:

- i) in mass circulation newspapers (in some on a regular weekly basis, typically in weekend editions, and in others on an occasional basis);
- ii) in consumer journals targeted at socio-demographic groups (e.g. women, the elderly), or interests other than tourism (e.g. rural interests, arts and culture) but which link to tourism.

Television and Electronic Media

Most television channels in major tourist generating markets now have specialist holiday feature programmes, inspired by the upsurge of interest in holiday taking. While these are important vehicles for destinations, they also constitute a source of information for competitor destinations.

Internet and e-mail are increasingly used to disseminate information about tourism (e.g. through a trends news service like Travel Impact Newswire) and to provide a forum for debate on tourism issues (e.g. Mountain Tourism Forum). These represent good sources of information for destination and operator planners.

Tourism Market Publications

Commercial tourism market information is provided through a variety of regular and one-off publications. Publishers range from NTOs (e.g. the English Tourism Council's Insights publication) to specialist tourism publishers (e.g. Travel and Tourism Intelligence, Tourism Industry Intelligence and Tourism Trendspotter), and broader business or retailing publishing houses (e.g. Mintel).

Professional Societies and Associations

In most countries, the tourism private sector has one or more trade associations, typically related to an operational sector (e.g. the USA has the Travel Industry Association of America, as well as bodies representing tour operators, travel agents, airlines, accommodation establishments etc).

There are organisations representing tourism professionals, much like the UK's Tourism Society. There are regional tourism organisations (such as the Pacific Asia Travel Association) and International associations (e.g. International Congress and Conventional Association, International Association of Amusement Parks and Attractions, Cruise Lines International Association).

Academic Journals and Tourism Books

As tourism has become a subject offered by increasing numbers of universities and other higher education establishments, so the volume of academic journals covering one or more specialist areas of tourism has grown. The premier such journal remains *Annals of Tourism Research*, but there are several new titles covering different aspects of tourism (e.g. *Tourism Management*, *Journal of Tourism Economics*, *International Journal of Tourism Research*, and *Journal of Vacation Marketing*).

Travel Trade Newspapers and Magazines

Each country (or wider region) has its own travel trade news and feature publications. *Travel Trade Gazette*, for example, has UK, Europe, Middle East and Asian editions. News on product and market developments, and reports on research surveys contained in trade magazines represent a rich stream of useful information on consumer and competitor trends.

Examples of Information Sources

For the research and completion of this report, the following information sources were consulted.

Activity Associations

- Professional Association of Diving Instructors, United Kingdom
- British Sub Aqua Club, United Kingdom
- British Surfing Association, United Kingdom
- Surfers Against Sewage, United Kingdom
- Ecotourism Society of Australia, Australia
- The EcoTourism Society, United States
- World Wildlife Fund for Nature, United Kingdom
- Ski Club of Great Britain, United Kingdom
- United States Skiing Association (USSA), United States
- International Ski Federation, United States
- Winter Sports Federation, United States
- Canadian Ski Council, Canada
- Sports Tourism International Council, United States

Specialist Publications

- Ecotraveller, United States
- Wanderlust, United Kingdom
- CondeNast Traveller, United Kingdom
- CondeNast Traveler, United States

Consumer Newspapers and Non-Specialist Publications

- The Daily Telegraph, United Kingdom
- The Times, United Kingdom
- The Independence on Sunday, United Kingdom
- The Independence, United Kingdom
- The Economist, United Kingdom
- Baltimore Business Journal, United States

Television and Electronic Media

- Travel Impact Newswire, Thailand

Tourism Market Publications

- Mintel, United Kingdom
- Travel Industry Intelligence, Caribbean and Europe
- Tourism Trendspotter, United Kingdom
- Insights – English Tourism Council, United Kingdom
- Travel Industry Monitor, United Kingdom

Professional Societies and Associations

- International Association of Amusement Parks and Attractions (IAAPA), United States
- British Association of Leisure Parks, Piers and Attractions (BALPPA), United Kingdom
- International Council of Cruise Lines, United States
- Cruise Lines International Association, United States
- Travel Industry Association of America, United States
- ICOMOS International Scientific Committee on Cultural Tourism, United States
- UNESCO, United States
- Global Mural Arts and Cultural Tourism Association, United States
- Tourism Society, United Kingdom
- International Congress and Convention Association, United States

Academic Journals and Tourism Books

- Travel and Tourism Analyst, United Kingdom
- Preservation Issues, United States
- Journal of Sports Tourism, United States

Travel Trade Newspapers and Magazines

- Amusement Business, United States
- Amusement Today, United States
- At the Park, United States
- Funworld, United States
- Travel Weekly, United Kingdom
- Travel Trade Gazette, United Kingdom
- Green Money Journal, United States
- Asia Travel Trade, Singapore
- SnowSports Industries America, United States
- Rural Europe, United Kingdom
- Farming Weekly, United Kingdom
- Business Travel World, United Kingdom