INDUSTRY FRAGMENTATION VS. TOURISM PLANNING

Presented by
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at the 1976 Annual Conference of
The Travel Research Association
Boca Raton, Florida
June 21, 1976

In this year of the nation's bicentennial, I believe it is appropriate to examine the past for clues to the future of tourism. My purpose today is to identify and describe a major problem of the past that I believe now hampers the future progress of tourism. That problem is fragmentation—the scatter and disunity resulting from rapid and unplanned growth of development throughout the country.

In the rush to develop the many individual pieces of tourism, we seem to have forgotten to establish any mechanism, formal or otherwise, to tie tourism together as a viable functioning system. Hence, any weakness or failure of a single part, such as was shown by the impact of the energy crisis on travel, weakens or even kills all the other interrelated parts, such as the hotels, motels, restaurants, resorts and other tourism businesses. Obvious as this truth may be, it has escaped the attention of both public and private segments of tourism throughout the land, especially at the planning stage. We only hear about it after the fact.

I need remind no one in Florida of the drop in 1974 of Disney World stock from $123.87 to $37.62 a share. (Zehnder: 1975, 327) The action of the tourism leaders in Florida to persuade Congress not to ration gasoline was commendable. But, what have the many segments of tourism across the nation done since to consider the outcome of future threats no matter the source? I see no private or government organization taking any leadership in identifying and interrelating the many parts of tourism and seeing to it that the total system of tourism continues to function. The closest thing to this is the very fine effort of William Toohey and DATO. But, I visualize the need for even a more comprehensive effort.

My concern over fragmentation is not philosophical. It stems from the real life consequences that derive from fragmentation. As I study the problem, I see that the rewards to visitors are reduced; that the opportunities for increased profits are foregone and that the resource base is eroded—all because we are not aware of the interdependencies between the many parts. Surely, if we were, we would see some action toward overall coordination and collaboration—certainly some overall planning.

The Tourism System

My research tells me that there are several main components of tourism that must function in a dynamic way if the many, many pieces of tourism are to succeed. There is more to motel or airline success, for example, than
internal operations of motels and airlines. There are many externalities. Let me suggest that all of tourism can be placed into five major components and that all five have very strong external relationships.

If we look to our state tourism agencies we see a part of what might be called an information-direction component. Probably the best-known and most heavily subsidized segment of tourism is that of advertising. But, there are other important parts of this category. Those pieces of informational literature, such as guidebooks and maps, play a very important role. Within our parks, the interpretive programs that help us understand what we are viewing also fall within this category. Highway signs and tour guides are important in helping tourists find their way about.

Another well-known component is that of the tourism businesses, especially those that provide the tourist with lodging, food service and entertainment. The services and facilities of this country have greatly increased in both quantity and quality in the recent decades. It is within this category that the greatest economic impact of tourism is made. These businesses produce the employment, the income and the taxes that are cited often as the treasures to be found at the end of the tourism rainbow.

However, important as these are, I have come to learn of three other very important components. Certainly, transportation is enough different from the others to be singled out. By transportation I do not refer only to airlines or highways but to the total movement of people in all of tourism. This must also include cable cars, hike and bike trails, horseback trails, bus tours, restored train rides and--as we see in many restored historic sites today--the use of the horse-carriage. (However, we still haven't solved the problem of putting a diaper on a horse!)

The fourth component is that of attractions--all those things that lure people to travel and give them satisfaction at destinations. Notice that I make this a separate category. I do this because it has been my experience that the hotels, the service stations and, yes, the airlines, tend to believe that their services are all that is needed to develop tourism. The objectives of the traveler are not merely to move about or to stay in a hotel that is just like the one he has at home. His main reason for travel is to see and do something--to participate in some attraction. Attractions are made up of many things but are heavily dependent upon location and a set of resource characteristics that make them special.

Finally, without the component of a body of people with the ability and desire to travel, there would be no tourism. We have become so accustomed to this category that we often take it for granted. It has been so elastic in recent decades that we lose sight of the special characteristics of the market. Not everyone likes to travel. Not everyone enjoys the same things. Not everyone has the same amount to spend on travel. Not everyone is located in the same reference to the transportation systems.
and the attractions. Research on the body of people with propensity and ability to travel has a long way to go.

My fundamental argument today is that each of these components, including the many parts within each, tends to ignore the other parts with planning and management policies. The motel man does not feel he has any relationship to the government policies that are used in the management of a highway or a park nearby. The park director does not feel that he is related to the service businesses that surround his park. The transportation people limit their concern to travel pieces, not the total transportation of travelers seeking a vacation experience. Meanwhile, both the environment and the travel experience suffer—suffer because there was no overall planning or coordination.

Problems of Fragmentation

Let me cite just a few examples of the fragmentation and disunity of tourism today.

The gasoline crisis squeezed out many small operators of tourist businesses, not because they were poor operators nor because they gave poor service but because they were improperly located in the first place. State highway departments, public park agencies and state planning departments generally are reluctant to give out planning information that would assist private enterprise in making sound decisions based upon full information. There is evidence that some governmental agencies would prefer that private enterprise would not succeed and make profits.

Nearly all surveys of tourists show "driving for pleasure" as the most popular activity and yet the parkways of the country are now in great financial difficulty. There is no mechanism whereby the National Park Service, developer of scenic parkways, can obtain any of the tax revenues that go directly to the highway departments. Furthermore, they are being threatened by unesthetic and poorly planned commercial development nearby. Mr. Raymond L. Freeman of the National Park Service recently made a plea for regional land use planning that would guide such growth in a way compatible with scenic parkways. (Freeman: 1975)

A similar interface problem exists between major parks and the nearby service businesses. Planning Director Gerald Christenson of Minnesota recently said, "The national government designates a park and makes it clear that it will accept responsibility for only the area inside the boundaries. State governments generally have said the area around the park is not our responsibility—that is a local matter. Most often the local units of government have not been equipped to meet the inordinate pressures put upon them by these developments." (Christenson: 1974)

Many of us as travelers have experienced the clutter and congestion along the typical motel row as we approach our cities. Research now shows that the multiplicity of messages from signs and businesses is not
even comprehended by the tourist. The "average observer cannot distin-
guish between more than seven different sights or sounds presented to
him simultaneously." (Ewald: 1971, 29)

On a recent 6,000 mile tour throughout eastern United States, I visited
many state tourist information centers. In addition to being offered
helpful literature, I was given verbal misinformation at every center.
I was directed to highways that were not yet built; to interchanges that
did not exist; to streets on the wrong side of the city and to other in-
formation offices only to discover that they were closed. I was routed
100 miles out of my way to avoid a highway bridge that was closed due to
flooding. By checking my own maps and making a little local inquiry, I
found a detour and bridge that took me only 2 miles out of my way.

Perhaps I am biased by the waterfront amenities of the areas in which
I have lived such as Michigan, Massachusetts, Hawaii and Texas, but I am
disturbed by the tourism development I see along coasts. Certainly, visitors
need and are anxious to pay for lodging, food service, products and other
services when they visit the water's edge. But, it seems that businesses
serving this need completely ignore protection of the scenery and access to
the very waterfront that puts them in business. Waterfronts are special
places and deserve landscape protection and development that keeps them
clean and beautiful. Furthermore, they demand planning concepts that
provide for a balance of open space and concentrated use. (Gunn: 1972b,
133)

Millions of tourists are attracted to our inland and sea waters be-
cause of the sport of fishing. After abusing our waters for many years
we are now showing improvement, especially with the introduction of salmon
in the Great Lakes. These fish are worth about $350 million annually to
Great Lakes states and the province of Ontario. Yet they may not be har-
vested in the next few years because of the increasing threat of contam-
ination due to PCB's—polychlorinated biphenyls—as effluents from plastic
manufacturers. I wonder how many tourist business people are pressuring
the industries and Washington to demand the enforcement of toxicity stan-
dards—standards that must be kept if the waterfront tourist businesses
are to survive and develop. (PCB's: 1976, 2)

Another example of tourism's lack of coordination was the Mississippi
coastal pollution problem of 1973-74. Bickering over jurisdiction of the
beaches and over how to define pollution overshadowed the issue of clean-
ing up the beaches. The main spark for concern did not come from tourism
interests but from the state health and pollution agencies. The only
voice of tourism came from the hotel and motel interests who objected to
posting beach pollution signs in their lobbies as their business dropped
about 10 percent. (Cartee: 1975)

Zehnder, in his book, Florida's Disney World, raises the question
about the possibility that some areas in the future may not want tourists.
This is based upon some of the social and environmental implications and
complications that come when a major attraction is established. The tour-
ism assumption that more and more is better and better may be up for test. (Zehnder: 1976)

I wonder how many people directly in tourist service businesses, such as hotels, motels, tour bus companies, restaurants and souvenir shops, have read the complete findings and recommendations of the National Tourism Resources Review Commission. Many examples are cited regarding the consequences throughout the country of the lack of integration of a total tourism system. For example, in the federal government alone, there are over 100 programs scattered throughout at least 50 agencies dealing with tourism, including ownership of 85 percent of all outdoor recreation lands—but they never speak to one another about tourism matters.

These are just a few examples that come to mind readily and that demonstrate the lack of any connectivity within the total tourism system. But, the most surprising aspect of all this is that neither the tourist business interests nor the state agencies for tourism seem to be aware of this nor care if they are. For example, it took two years and over a million dollars for environmentalists, fishing and oyster interests and owners of a major resort complex, completely on their own, to defeat the enticements of the South Carolina state industrial development agency to lure a German petro chemical plant to Hilton Head Island. Ironically, no state tourism business interests, nor the state tourism agency, came to their aid. They looked the other way. (McCaskey, 1972)

From my observations about tourism in this country today I come to three conclusions:

First, from a marketing point of view, the public is looking for security and certainty that they are not getting. When package tours are aborted midstream; when advertising promised tropical temperatures and bikini-clad maidens on the beach and the tourist finds near-freezing temperatures and no other wildlife than a dead crab; when a park is closed after driving 2000 miles to get there—that "set of human activities directed at facilitating and consummating exchanges," Kotler's definition of marketing, completely breaks down. (Kotler: 1972, 12)

Second, tourism as now practiced, violates basic tenets of modern human ecology. As we have exploited our natural resources we have been more concerned about economics than ethics, property rights than societal amenities, and consumption of resource assets than their protection.

Third, today in America, in 1976, tourism, as a unified system with continuity and integration of its parts, does not exist. Yes, we have tourist businesses; we have state and national advertising agencies; we have tourists. But, if we think of a total functional system of tourism we do not have in this country any organization or agency, public or private, that is concerned with bringing the many parts into harmony and with keeping the system running in harmony.
A Scenario

Now, since I am an optimist at heart, I cannot finish this talk on a doom-and-gloom theme. Therefore, let me describe to you, not a projection of the past—because I am not convinced that we need to do more and more of the same, especially if it is wrong—but a scenario of what could happen if the many fragments of tourism were given greater unity. Consider for the next few moments what might be accomplished if we were to plan a more completely coordinated overall tourism system.

Let's start with a family planning a vacation trip.

Instead of stumbling onto place names by scanning distorted advertising by only those places wealthy enough to advertise, the family makes contact with the local tourist advisor. Every city has one as part of the local continuing education, adult education or community education program. These advisors are financed partly by the local community and partly by the state tourism agency. This has come about through a broadening of the state agency role.

At this advisor's office, the family is able to get instant computer video and printout information of interest. With the simple touch of a few buttons, the family can obtain information on: the location of attractions and accommodations, the best highway routings depending upon their desire for speed or for scenic interest, the climate of the destination area and the proper clothing to wear.

This information is backed up, not with a promiscuous scatter of voluntary advertising folders that really provide little help to the tourist but rather a series of well-written and beautifully illustrated guidebooks. These guidebooks do not exaggerate attraction features of localities but provide authentic descriptions.

In addition, a new service is available to would-be travelers through their local newspaper. A regular daily column is written by a member of a new breed of journalists—the travel critic. Instead of saccharine descriptions of utopian resorts, this writer tells it like it is, in exactly the same manner as a drama or music critic. Whether or not we always agree with the critics, they do serve a positive function. They provide analysis upon which we can better make our own judgements on the expenditures of vacation time and money.

A further refinement of the counseling system is that which recognizes the importance of "word-of-mouth" promotion. Research repeatedly has shown that this is more effective than advertising. Because former visitors have registered at destination attractions, this information is relayed to the tourist advisor's office. The computer then prints out the names and addresses of neighbors who have actually been to the attraction. A simple contact with these neighbors provides input about the attraction as they found it.
This information system is coordinated with highway departments, airlines and advertisers to assist travelers in finding these locations as they travel. All highway signs are coordinated. Information is provided primarily through other media, such as radio, TV, folders, booklets, and guidebooks, thereby eliminating the need for billboards. This, in turn, protects the scenery, an important attraction need of the auto traveler.

Each state transportation agency has regular input from the tourism agency, keeping it informed on trends in tourist flows and trends in new land development. As soon as a major attraction or vacation home complex is decided upon, for example, the highway planning office goes into gear to determine if highway changes are needed. Affected communities are alerted before a development takes place so that proper transportation and other services can be developed.

Better mixes of transportation modes are available. Airports are tied to highway routes and to bus lines and mass transit lines. At every node, complete information about related transportation is available. The emphasis is not upon an airline succeeding only in transporting people from airport to airport but serving their segment of total travel of people from home to destination and back.

Regarding attractions, all federal and state agencies have identified those portions of their holdings that function as tourist attractions. Instead of exercising antagonistic attitudes toward private enterprise, these agencies collaborate by identifying places either outside their boundaries or within where mass development is most compatible with their holdings. The increased economic impact is helpful in supporting the public investment and operating costs of their holdings.

For example, portions of national parks that are of great interest to visitors are designed in ways to perpetuate the resource assets and are developed and promoted for visitor use. This use is planned with linkage to service centers for private enterprise accommodations, food service, entertainment and shopping. These service centers, however, are not built directly upon the major attraction elements of the park.

Through marketing research, it has been found that all travelers can be classified into interest groups. The activity listings of the past—fishermen, hunters, skiers, etc.—were found to be of no value to planning. Instead it was discovered that there was a linkage between a person's interest profile and the desire to use certain facilities and services at a tourist destination area. For example, those who liked symphonies also liked superlative scenery as in national parks, fine road plays at vacation playhouses, gourmet restaurants and nature paintings and photographs. These interest mixes of the people are transmitted to destination areas for planning purposes.

Attraction development in all states has taken on an entirely new concept. Each state agency for tourism, in response to its broad social and environmental responsibility, provides a sophisticated planning base that
eliminates much of the hodge-podge and erosive development typical of today.

The foundation for this is recognition, as in agriculture, that not all lands have equal potential for development. Contrary to the egalitarian "chamber of commerce" approach, each piece of geography is recognized as having a different set of natural and cultural assets, different relationship to sources of people, different relationships to service communities and different relationships to access and transportation. Therefore, some areas have great potential for tourism whereas others do not. Federal and state tourism policy provides incentives to those areas with greatest potential, which includes as a prerequisite, least damage to the environment.

Each state has been analyzed to lay the base for two types of potential: 1) areas with greatest potential for touring or travel-through types of tourists and 2) areas with potential for destination-oriented tourists. Where the two types converge, there is greatest potential for private enterprise to provide all the commercial support services--food, lodging, entertainment.

These elements of a state tourism plan, prepared in each state, have come from thorough study of existing factors known to be important to the total tourism system. For example, both natural resource and cultural resource factors, very important to attractions, have been studied and mapped. Additional factors, such as transportation routes, existing development, established community centers, and relationship to prime tourism markets have been identified. All this information is readily available to all existing elements operating within the state's tourism system as well as to new public and private developers. Thus a planning approach, backed by both state and federal policy, is available to the entire tourism industry.

In this scenario, all segments of the tourism system retain their individual integrity but accept a new social and environmental responsibility. No monstrous federal or state agency or private monopoly takes over. Private enterprise, because it knows the attraction and resource base is being protected and perpetuated, can increase its opportunity and creativity to serve the public and make profits. Public agencies, because they have zoned their lands into portions most appropriate to varying use, have greater opportunities of carrying out their goals on their own terms, whether it be conservation and preservation or enrichment of people through their leisure use of time.

Conclusions

Let me conclude by saying that my purpose was not to provide a new gimmick for marketing nor a complicated formula for planning tourism. Rather, I have attempted to outline the need for tourism planning and coordination, primarily for its survival.
Why can't we research markets more completely and more deeply to see what people really want and do? Why can't we improve our transportation system to reflect the real needs of people on vacation and in their leisure? Why can't we recognize the interests of people in the development and operation of both public and private attractions no matter the jurisdiction? Why can't the service businesses see more clearly the need for supporting the protection of certain resource assets and the development of public, and non-profit attractions? Why can't government agencies see their responsibility to both visitors and to private enterprise when major public recreation and park areas are established? Why can't some so-called environmental groups recognize that the mass traveling public as well as ecology buffs have a right to enjoy and gain enriching experiences from contact with our natural and cultural resources? Why can't our information and direction services be more accurately and more clearly directed to people's needs and interests and at the same time foster both the social and economic values of tourism?

In short, why can't we have joint planning between private enterprise and governments that will be concerned about making the total tourism system work—for the betterment of the visitors, for the betterment of business, and for the betterment of the physical environment?
References


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