TOURISM IN THE SOUTH IN THE 1980's

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By way of introduction, I wish to commend *Southern Living* on two important accomplishments. Having served on the awards committee of the American Society of Landscape Architects in the past, I know that the recent award bestowed upon you is well earned. Second, this year *Southern Living* is in the top eight magazines of the country on the basis of number of travel pages and also travel revenues. Congratulations.

After I accepted this assignment, I realized that I could not give you my normal class lecture on tourism because you have not had the prerequisites. Nor could I give you the talk I presented recently to the Canadian Institute of Planners because you deal more directly with a practical world. And, I could not give you the paper I developed for the coming World Tourism Conference to be held in the Philippines this fall because it is slanted toward undeveloped countries. Who would agree that the South is an undeveloped country?

So, I saw no alternative than to prepare something especially for you. I am pleased that you are willing to take the time to consider within your editorial ranks the topic of tourism. This again endorses the broad and innovative policies of *Southern Living*. I know of no group who is better at doing their job or who is more innovative and creative in presenting fresh and stimulating material, month after month.

I have been asked to share with you my views on how I see tourism developing in the 1980's. We thought that the 1980's were a long way off— they are here! Can tourism continue along present lines, or will there even be any? Certainly, there are many clues today that raise serious questions about tourism in the future. There is a popular view, especially among legislators, that tourism is not only doomed but that it should die, or has a very low priority when it comes to legislative response to energy problems.

Those of us interested in tourism professionally do not necessarily agree but do admit that we are definitely experiencing sobering times. In the next few minutes I would like to describe some aspects of tourism that may stimulate you to change or perhaps reinforce some of your own views toward tourism.
TOURISM DEFINED

Before we go very far in this discussion, we need to agree on what we mean by tourism. I find that the term is not considered the same by people with different backgrounds or perspectives. Because it is such a powerful phenomenon, now ranking in the top items of world trade, exceeding $325 billion a year, it is worthy of being identified. In spite of inflation, last year international tourism was up 15 percent. For the South, the 15-state coverage of Southern Living, tourism employs over a million people and provides some $25 billion to the economy. The South continues to receive the highest percent of all person-trips in the United States as compared to other regions.

To start with, tourism frequently includes both business and pleasure travel although many consider primarily its leisure and recreational qualities. Business trips increasingly are becoming so diffused with pleasure and visiting nearby areas that it is not always productive to attempt a separation of the two.

For many, tourism is only the buyers and sellers of travel. To me, this is incorrect because it is too narrow. Certainly, airlines, motels and food service are important, but so are many other things.

For example, there would be very little tourism if it were not for thousands of developments based upon our cultural resource assets. Restored buildings and redeveloped sites of historic interest are becoming much more popular, especially in the rich cultural setting of the South. Interest in our roots and interpreting them with living history development have surged in recent years.

Natural resource foundations are as essential to tourism as are the airlines and hotels. The many water resources, especially in the South, provide an essential ingredient for tourism. The forested areas are now as popular for their esthetics and solitude as for their support of wildlife. For many people, tourism is intimately linked with wildlife, nowadays as much for beauty and targets for photography as for rifle targets.

A very important part of my tourism definition is seasonal change. The seasons bring on a great variety of landscape appeal, from Spring through Winter. The greatest impact that the South had on me as I moved from my native Northland was the extremely beautiful and enjoyable long Spring and Fall periods. Related to this, of course, is the winter climate. Perhaps no other element of tourism is more important for the South than its favorable climate for so much of the year.

For my definition of tourism I must include millions of acres of governmental land—city parks, county parks, state parks and public recreation areas. Some 100 federal agencies control over 85 percent of all outdoor recreational land in this country.

Of course, tourism does include a great many commercial enterprises, especially those that provide transportation, food service, entertainment and lodging. And, my definition of tourism includes vacation homes and resort complexes. They require travel from home and provide enjoyable leisure experiences.
Within tourism we must also include all the ways we learn about places. The several communication media, together with the important influence of friends and relatives, help form our images of places, long before we ever go there.

We often forget that our entire communities are a part of tourism. Everything we do for ourselves—our residential areas, our schools, shopping areas, churches and even work activities—are often of interest to visitors. Over 45 million people annually enjoy visiting manufacturing and processing plants.

But, the most critical element of any definition of tourism must be the psychological and sociological value to every individual participant and to society as a whole. This must be the final objective of all tourism—personal satisfaction from the experience. Students of tourism are becoming convinced that tourism is founded in a basic human need—the right to travel and to be enriched thereby. Tourism is not the exclusive possession of a region or a country but of all mankind. During the Vatican Congress on Spiritual Values of Tourism in 1967, Cardinal Santos of Manila quoted an old Chinese proverb that went like this: "All the people washed by the five oceans are brothers."

Perhaps this briefly indicates that my personal definition of tourism goes much farther than the buyers and sellers of travel, important as they are.

DYNAMIC ADJUSTMENT

With this introduction, perhaps we can see that tourism is a complicated phenomenon and therefore vulnerable to a great many influences. For the first time in the history of tourism, we are no longer accepting the simplistic approach that tourism development is merely a matter of promotion. Many influences are causing dramatic tourism change. Investors and governments are becoming more cautious about their decisions to develop and consumers are becoming more careful and frugal about their travel decisions.

Let me now relate a random selection of examples that illustrate dynamic adjustment within present tourism.

Few factors are having greater impact than the balance of currency exchange. For the first time in U.S. history, international travel is reversed—as many tourists are coming to our country as Americans are going abroad, primarily due to the drop in relative value of the dollar. In 1979, we had one-half million more foreign visitors to the United States than in 1978.

We also know that on the international scale, tourism is affected greatly by riots and unrest. Conflicts threaten travelers. Internal strife can completely destroy a country's economic impact from tourism.
But, for some countries, tourism is expanding rapidly. Central and South America anticipate major growth. Last year AeroMexico gained 10.4 percent over the year before and anticipates a 30.7 percent increase this year. Mexico is now planning 70,000 new hotel rooms.

On the domestic front, there is no question that lack of gasoline supply and media jitters of early summer depressed automobile travel greatly. But, the impact was not as great as anticipated. Visits to the national parks of the South were down only 2.7 percent for 1979. Visits to KOA campgrounds nationally were at an all-time high in November-December, 1979. December of 1979 was 15 percent over the same month of 1978.

Tourists stopping at the several Texas Information Bureaus dropped overall in 1979; 7.1 percent less than 1978. But, three of the Bureaus were up; one as much as 5 percent.

Six Flags Over Texas, while experiencing a drop of 14 percent in June, ended up with a seasonal drop of only 4 percent—an August larger than ever before in their history. They are installing $100,000 worth of gasoline pumps to assure travelers their start toward home this year.

The recreational vehicle industry has made drastic cuts in weight to adapt to the smaller and lower-horsepower cars.

A favorable trend has been an increase in two-income families. The number of working husbands and wives in the over-20 age group is stimulating demand. The number of men 35 to 55 (a travel-prone group) will grow 30 percent during the 1980's—only 4 percent in the last decade.

We are seeing a trend toward more specialized travel. Probably influenced by the Love Boat show, cruise ship business is booming. In 1979, there were some 800,000 more passengers than the year before, bringing the North American total to an unprecedented 2 million. Now, on the Queen Elizabeth II, dogs are admitted—have choice cuisine, a pooches promenade and kennel maid social directors.

The American Contract Bridge League is another example of specialized travel with members taking some 600,000 person-trips each year, spending approximately $60 million in accommodations, food and transportation.

Backpackers were once believed to be low-income, poor-spending school dropouts. Today, the median income is $28,000; 82 percent have college educations; he averages six trips a year, all over the world, spending an average of $2,300 per year.

Research work by Dr. Van Doren of our department has shown that hotel-motel growth in the United States moved to the South and West in the period of study, 1963-1972.

Perhaps these few examples support the observation that we are in a period of dynamic adjustment of tourism. If we assumed a functional model of the tourism system as composed of five major components, we could agree that all are now changing considerably. These highly interrelated
components are: (1) people with interest and ability to travel; (2) attractions that provide for satisfaction; (3) transportation; (4) supporting services and facilities; and (5) the information and directional systems. All are now in a state of flux, but the system is not coming to a halt. I am convinced that the personal desire to visit places away from home has become a norm for millions of people—not excesses or luxuries; and that we are going to protect the right to do so.

CHALLENGES FOR THE 1980's

Looking ahead, I see two major challenges for tourism. First, we need to become much more sensitive to the characteristics, habits, and interests of people. Second, we will need to completely overhaul the tourism supply product. For the next few minutes I would like to draw upon some illustrations that support these challenges. Even though they are drawn mostly from public agency development, I believe they apply equally well to private enterprise.

A recent study we performed with graduate students investigated the visitors' use and reactions to eight historic sites. Observation of traffic flows and interviews with visitors showed that most of the people were satisfied generally but that major improvements were in order. For most of the sites, visitors were misdirected and confused and even congested by the layout of visitor circulation. In several instances, visitors were hedged about with many prohibitions. The interpretive programs often treated visitors as children and frequently the programs were biased toward only one aspect of history.

Some other facts from this study:

30% of visitors bring cameras but most sites prohibit their use.

16% wish to buy souvenirs but no provision is made for it.

Only a small percent of non-white visitors participate because historic interpretation is biased.

Some comments from visitors:
"You didn't learn much you didn't already know."
"Slide show didn't go with the site."
"Have the tour guide explain more."
"Too much trivia."

Another study about tourists and their visits was performed by interviewing 800 visitors to 10 Rocky Mountain national parks. Some of the findings:

An unanticipated 57% had college educations, yet programs were directed to lower levels.
Almost one-half stayed overnight outside the park, suggesting that interpretive programs should be provided there.

A very high (97) percent has participated in interpretive programs before, suggesting that new presentations annually are essential.

84% stopped to view or photograph the native plants and 79% stopped for the wildlife; yet management was erecting barriers along roads to prevent these worthwhile visitor activities.

Over half enjoyed socializing with other visitors, particularly sharing experiences of contact with nature in the park--a valuable asset to society. Yet, the administration is forcing out most of the places where this can occur.

An interesting piece of research by Canadians about American tourists is quite revealing. It divided us into these categories:

- Non-active visitors: 29%
- Foreign travel vacationers: 26%
- Outdoor vacationers: 19%
- Active city visitors: 12%
- Resort vacationers: 8%
- Family sightseers: 6%

Studies such as this suggest that we may need to make special promotion and development for these several segments of tourists.

These and other studies bring us to some rather revealing conclusions:

1. Lots of rules of "don't do this," "don't do that" need to be justified to the public. Rules need to be reasonable.

2. Design of physical development can solve a lot of communication problems.

3. We may need to segment our offerings, our products, to meet segmented markets.

4. Management needs a better understanding of the visitor's total pattern of activities and how important communication is throughout.

5. We need to get over our prejudices in interpretive methods and make greater use of music, pageantry, and special programs and places that foster socializing.

6. We need better collaboration between all the private and public elements of the tourism product.

7. We certainly need better research of the behavior of tourists.
Two examples in Canada may serve to demonstrate how planning, design, interpretation and management have been coordinated to solve many of the problems posed above.

In Ontario, at the base of Georgian Bay is an excellent example of restoration--Sainte Marie-Among-the-Hurons. Originally a missionary post, built from 1639 to 1649, this site is now rebuilt and open to visitors. Many years of detailed archeological research were required and the development now represents an authentic image of the ancient setting. Well-trained interpreters are on hand to explain the context of this historic place. The museum nearby contains informative literature and lectures of help and interest to the tourist. Thousands of tourists can now obtain stimulating and rewarding visits, proving that a high level of professionalism and sensitivity to people and place is worth it.

Adjacent to this is an equally well-done development based upon natural resources--The Wye Marsh Wildlife Refuge. The design and management prove that thousands of visitors can obtain insight into nature without damaging fragile and rare resource assets. By means of good layout, good exhibit design and good interpretation, the visitor not only has a good time but comes away with deeper knowledge and respect for natural resources.

TOWARD BETTER TOURISM IN THE 1980's

Observations and study of tourism today do not point toward clear projections for the future. However, some challenges within a better understanding of demand and an improvement in supply are indicated.

* For example, I believe we will need in the 1980's to move away from the homogenized and copycat approach toward a more diversified and creative approach. By this I mean that we have tended to proliferate sameness of styles and business types because they appeared to be successful. Changes in the marketplace, however, suggest greater diversity and more original answers to the tourist's needs and wishes. Certainly, a more sophisticated clientele is demanding better quality.

* At the same time that we strive for better quality, we may also be able to simplify service. Airlines may be able to drop meal service, movies and even reservations. Automobile manufacturers may be able to eliminate many of the frills and conveniences and yet provide well for specialized markets.

* Generally, our increasing technology and burgeoning communication systems are not necessarily producing better knowledge about travel. Several publications, including Southern Living, have increased greatly the quality and quantity of information. But, tourism as a whole still has poor maps, poor guidebooks and poor tour guiding. The public is increasingly frustrated with lavish promotion but little guidance on: how to get to destinations; when they are open; what they will cost; what to wear; what the weather will be like; what travel etiquette is important; and how to fight back if things go wrong.
* I am much concerned about the erosion of the private enterprise system. Too few people are being challenged to enter business and too few Americans really understand profits—that profits are socially responsible and provide government its support. Certain fundamental principles of free enterprise must be protected: the right to start and discontinue a business; the right to purchase any resource one can pay for; the right to produce any product or service and to offer it for sale at any price; and the right to invest in any way.

* I suggest it is time for a reversal of the present trend toward bigness. Bigness is showing high overhead, inflexibility of response to market changes, remoteness from local affairs, poor customer service and many other ills. On the other hand, small business can: provide warmer and faster service; be much more responsive to the customer's needs and make rapid innovation in service; utilize local labor more effectively; buy locally, increasing the export value of tourism; expand and make changes more rapidly; and avoid monopoly and price setting. We may see a return to "tourist rooms" and adoption of the European pattern of "bed-and-breakfast."

* I see an expanding role for the non-profit sector. I believe that higher prices of commercial facilities and cutbacks in governmental programs will foster more non-profit development for tourism. The non-profit sector is particularly able in historic restoration and in youth and church programs.

* My next point is not a political message. It merely states a fact. We need less government as a participant in tourism. I agree with Friedman's concept of the role of government as "an umpire, not a participant." In recreation and tourism, like no other field, government has become an increasingly competitive participant of private enterprise. I see government as more legitimately involved in: sponsoring research; stimulating innovation with incentives; integrating the many agencies involved in tourism; and I see government owning those vast and exceptionally rare resources that are not profitable or demand public protection. Private enterprise (with input to the economy) suffers when governments (with a drain on the economy) build and operate hotels and campgrounds that compete unfairly with undercut rates. This is not only unfair competition but improper government.

THE FUTURE OF THE SOUTH IN TOURISM

Let me highlight a few of the opportunities that, in spite of energy problems and inflation, now are available to the South.

* Few places in the world have the untapped water resources for tourism as we have in the South. Some 43.8 percent of all the U.S. coastline is in the South (your Southern Living region). We could make much greater and much better use of the water-land interfaces and river corridors by mixing the assets together for better and more imaginative tourism development.
Our historic background is rich and abundant. I see great opportunity for redevelopment, reconstruction and interpretation of our past. Recently, when visiting Spain, I could not help but reflect on the opportunities for promoting more Spanish visitors to the South—the region that was under Spanish rule for over 300 years. When King Philip of Spain was completing his palace at La Granja in the early 1700's, the San José Mission in San Antonio was being built.

My scenario includes much greater emphasis on the arts. Just now we are beginning to recognize the painters, musicians, poets, writers, performing artists and craftsmen of the South. But, their locations could become exciting and valuable targets for travel if properly developed.

I also see a very logical trend toward greater development nearer home. Tourism, even in the past, has been misunderstood as dependent mostly on long-distance travel. Many opportunities go untouched right near home because of this misconception.

My final point is to reemphasize the great need for better communication. We need better communication and understanding between the several actors in tourism decision-making. If we are to see better tourism, we need better ways of integrating the complicated maze of individual businesses and public development. Important in the 1980's will be a broader understanding of tourism community-wide. Too often tourism is seen locally as an exclusive function of the visitor's bureau or the chamber of commerce. It certainly is much more than that. And, although Southern hospitality is not just a cliche, we need better communication between visitors and hosts. Part of this could be fostered by better communication between the promoters and the suppliers of the tourism product at destinations—being able to deliver what is promised.

So, this is my scenario for the 1980's in tourism. It certainly is not doom and gloom. Especially pervasive is the human desire to travel and to participate in all the rich and pleasurable values that travel can bring. Tourism is you and me and the future of tourism is yours and mine.