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ENVIRONMENTAL FACTORS AFFECTING THE TOURISM INDUSTRY AS DETERMINED BY CONTENT ANALYSIS

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ABSTRACT

This paper introduces the content analysis method as a way to analyze the tourism industry business environment. Over 1500 articles appearing in the 1988 issues of eight different academic and trade publications on the travel and tourism trade were content analyzed in order to monitor the environmental factors which affect the tourism industry. This paper discusses the findings and their implications for managers in the travel and tourism industry.

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INTRODUCTION

The normative literature in management indicates that an organization's management decisions should be based on an alignment between a strategy and the organization's environment. Therefore, the strategic management perspective of management highlights the significance of devoting more attention to "environmental scanning" and formulating strategies that relate directly to environmental conditions (14, 16). The concept of environmental scanning is well recognized in marketing circles as the first step in marketing planning. Put most simply by Lewis and Chambers (10), it is "... the process by which management attempts to understand the world."

Due to the nature of business, all tourism organizations do make projections of what is likely to happen in the future. Based on these

estimates, tourism organizations decide how they may adjust to future events. As the tourism industry's business environment becomes more volatile and competitive, it is increasingly important for a tourism organization to attempt to forecast future conditions so that the organization's objectives can be achieved. This paper, through an example of a trends analysis performed on the tourism literature of 1988, will describe how the process can be used to compile and synthesize relevant marketing information for tourism industry businesses.

THE DEFINITION OF THE TOURISM BUSINESS ENVIRONMENT

According to the literature in strategic management and marketing, there exist two interactive and interrelated segments in an organization's external business environment: the operating environment and the remote environment. The operating environment consists of the forces and conditions within a specific industry and a specific competitive operating situation. The remote environment, on the other hand, refers to forces and conditions which include the general economic, political, social/cultural and technological framework within which competing organizations operate (3, 6, 14).

Environmental scanning in tourism is complicated by the fact that the tourism business is a multi-dimensional industry which is composed of many different sub-industries. Transportation, attractions, retail, lodging, food service, and information service businesses all play an important part in servicing tourist demand. In addition there is the intangible element of the influence of the host community. In order to understand all of the factors affecting the tourism industry, the broadest possible definition of tourism was sought. The holistic nature of the tourism environment is reflected in the definition offered by Lieper (11).

> "   the system involving the discretionary travel and temporary stay of persons away from their usual place of residence for one or more nights, excepting tours made for the primary purpose of earning remuneration from points in route. The elements of the system are tourists, generating regions, transit routes, destination regions, and a tourist industry. These five elements are arranged in spatial and functional connections. Having the characteristics of environments: physical, cultural, social, economic, political, technological with which it interacts." (11)

Following from this definition the general environmental categories proposed by Bates and Eldridge (3) were utilized by the researchers (See Table 1). These external environmental categories were further classified into subcategories as defined in an earlier study conducted on the hospitality business environment (1).

The components of the tourism phenomenon proposed by Gunn (8) were used to categorize the specific operating environment in tourism (Table

2). A further distinction was made as to whether the impact of the information was national (related to the United States) or international in nature. The model of the tourism phenomenon proposed by Gunn (8) includes five components of the tourism system: the demand component (tourist), the linking components of information/direction and transportation, and the supply components of attractions and facilities.

The category called "tourist" is a classification scheme of the reasons for travel as studied by the United States Travel Data Center: business, pleasure, or personal (visiting friends and relatives). In this study the information in the information/direction sub-category in the Gunn's model is categorized with the use of the well recognized marketing tenants of product, price, place, and promotion. As mentioned previously, it represents the linking component of the tourism system. It includes information about the various lines of communication between the demand and the supply components. In tourism, however, these topics take on wholey different meanings than in a traditional manufacturing setting. The term product is meant here to mean all tourist support services, attractions, and transportation to and from the guest origin. The price is the cost of all services purchased during, or as a result of, the trip. Place refers to the point of sale and/or the distribution network for tourism. Examples are travel agencies and their reservation networks (retail), and tour operations (wholesale). Promotion refers to all of the various ways that travel and destinations, attractions, transportation, and tourism service facilities are packaged.

Transportation is viewed as part of the linking component of tourism (9). The transportation category of the database contains information about the transportation industry. It categorizes the industry by mode of travel. The sub-categories are land, sea, and air. The services and facilities category consists of information about the tourism support services industries other than transportation. It includes the people that work in them (human resources) as well as the physical facilities. It should be noted that the term facility included both coliseum and convention centers, a controversial topic in the tourism industry. The category called attractions includes the geographic area or region which is marketed as the destination and any special events organized with tourism in mind.

METHOD

Content analysis was the primary research method employed in this study. Content analysis is a technique that essentially consist of scanning written works on a given subject to make inferences about related issues by categorizing and counting statements made about those issues (4). The content analysis process involved analyzing articles appearing in the trade and professional journals related to the travel and tourism trade and determining their major themes and relative editorial spaces. This was accomplished by reading the title, first paragraph, the first sentence of each subsequent paragraph, and the concluding paragraph of each article. Each article was then categorized as belonging to one of the environmental categories in Table 1 and 2. The relative importance of the articles was weighted by length with the

number one indicating that the article was less than one column long and the number five indicating that it was more than one page.

In an attempt to provide a cross section of the body of knowledge of tourism related literature, both trade and professional journals were chosen for this sample of the literature. Based on a consultation with a panel of professionals in tourism research, eight travel and tourism related journals were selected for inclusion in this study. The eight journals which were content analyzed included:

Annals of Tourism Research (ATR)
Corporate Travel (CT)
Meetings and Conventions (MC)
Meeting News (MN)
The Journal of Parks and Recreation (JPR)
The Journal of Travel Research (JTR)
Travel Holiday (TH)
Travel Weekly (TW)

As a result of the content analysis process described above, a total of 1,515 articles were content analyzed. By the weight scale described above, the database had a total weight of 4,155. Table 1 and 2 show the contents of the database by the general and specific tourism environmental category. To facilitate simultaneous referencing of information across categories an electronic database system was employed. The use of this technology is important to the process in that it allows trends in the various categories of the environment to be observed simultaneously, facilitating understanding of the theoretical connections between them.

GENERAL ENVIRONMENT

The research identified the following four major trends in the general environment:

1) Sociocultural - Emphasis on education and internationalism.

* concern for the level of professionalism in the industry.
* increasing awareness of the positive impacts of tourism.
* interest in unique cultures.
* concern for the negative impact of terrorism and political unrest on tourism.
* concern for the negative impact of pollution on tourism.

2) Political - Emphasis of ecological issues, and expansion and rebuilding of tourism industry infrastructure.

* maintenance of the aging airplane fleet;

* protection of the American airline industry against the unfair trade practices of foreign countries.

* the federal governments desire for free market mechanisms to help

fund public facilities including airports and convention centers.

3) Economic - Emphasis on the impact of the tourism industry on the balance of trade in services.

* the reduced value of American dollars relative to the currency of origin and host nations.

* the relative cost of transportation being adversely influenced by the strained transportation infrastructure both in the U.S. and abroad.

* the use of tourism as an economic tool by second and third world nations.

4) Technological - Emphasis on the impact of advances in computer and communications technology on travel activity.

* emphasis on efficiency and economy in meetings.

* multi-tasking and hypertext provide access to on-line data bases for more area specific information.

* laser disc technology provides tapes, text and maps of tours.

Each of these major trends has either direct or indirect impact on the trends occurring in the tourism specific environment. The reader is therefore asked to keep the broader context of the general environment in mind as trends in the tourism specific environment are discussed in more depth.

TOURISM SPECIFIC ENVIRONMENT

The following is a discussion of trends in the tourism specific environment. As part of the content analysis process, specific key topics within each category of the tourism specific environment were analyzed. In the future, by comparing the relative size of these topics across time the researcher will be able to distinguish patterns of change in the relative amount of print space given to each topic.

1. Tourist Demand

Demand for business travel received 72% of the editorial space in the category of tourist demand (Table 2). The most popular topic in the database was convention/meeting, with 61.95% of the articles within the tourist demand category (Table 3).

Business travelers -

* Corporate travel planners attempting to influence/control the purchase process.

* Demanding higher quality services.

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* Planning their trips and meetings more efficiently and
  economically.

* Planning smaller meetings.

* Meetings that mix business trips with vacation or incentive
  travel.

Pleasure travelers -

* Growth in pleasure travel in the U.S. due to weakening of the U.S.
  dollar and demographic shifts.

* Rapid growth in dual income families.

* Average U.S. household shrinking in size.

* Dual income families have more discretionary income.

* Less time to spend on leisure travel.

2. Information/Direction

    The information/direction category was the largest of all categories
in the database, holding 26% of the information within the specific
environment (Table 2). Most of the articles in this category are related
to the tourist experience.   Information related to travel agencies and
tour operations comprised over 36% of this category (Table 3). The key
word "marketing" was the most common with 49% of the articles speaking to
this larger issue.

Product -

* Smaller meetings becoming popular.

* Incentive travel rising in popularity.

* Emphasis on adventure and physical fitness in pleasure travel.

* Growth in services for the senior market.

Price -

* Discounting targeted at market segments (i.e. seniors).

* Airlines continue to raise air fares following increasing oil
  prices.

* Off season discounts in hotel industry.

* Overall travel costs expected to increase.

Place -

* Airline/agency relationship - pressure to shorten the distribution channel.

* Emergence of mega travel agencies.

* Corporations negotiating directly with suppliers or through mega agencies.

Promotion -

* Destinations becoming more conscious of the value of advertising and promotion.

* Increase in the number of media options available to the tourism industry for promotion (i.e. traditional TV, newspaper, magazine advertisements, computer software, home videos.

3. Transportation

There are 187 articles coded in the transportation category; 25% are land, 18% are sea and 57% are air transportation (Table 1). The most popular topic under transportation, over 52% of the articles in this category, is "airline/airplane" (Table 3). The key word "cruise ship" was the second most common with "automobile" ranking third.

Airlines -

* Frequent flyer programs, including double and triple mileage credits extremely popular.

* Increased consumer concern for performance ratings and service quality.

* Continued consumer concern for safety related either to the aircraft or the people operating the machinery and the facilities that support the industry.

Cruise -

* Over-supply, increased competition.

* Marketing efforts intensify.

* Travel agency commissions from industry lucrative.

* Younger market segments targeted.

Rental Cars -

* Companies consolidating.

* Increased regulation and airport concession fees for vendors.

* More variety in vehicle offerings (i.e. 4-wheel drives, jeeps, vintage cars and luxury cars).

* More amenities (i.e. Cellular phones).

Taxi -

* Major cities are using lotteries to increase taxi fleets.

* Driver training and testing their knowledge of their city.

* Credit cards being accepted.

Recreational Vehicles -

* Sales continue to be strong.

* Development of low to mid-price vehicles appealing to young families and middle class senior adults.

4. Services/Facilities

The major trend in tourism facilities is renovation and expansion of the infrastructure. The primary tourism facilities that are experiencing growth are airports and convention centers. Lodging was the most common topic within this category (Table 3). Although new construction of hotels may have subsided since the early 80's, expansion of airports or the capacity for conferences continues to spur the renovation, if not the construction, of modern sleeping accommodations. The number of new convention centers increased 37% between 1980 and 1987 and further growth of 110% is predicted during the next decade (12).

Airports -

* Expansion of runways, terminal space, and number of gates.

Convention Centers -

* Expansion and renovation of conference facilities.

* Construction of smaller conference centers for smaller communities.

Lodging -

* Older properties renovating and expanding.

* Hotels incorporating both meeting and recreational facilities in their renovations.

* Packaging and promotion including increased discounting.

Food Services -

* Lighter, lower cholesterol foods.

* Buffets that allow people to eat only as much or as little as they want.

* Ethnic or regional foods.

Human Resources -

* More women, senior citizens and minorities.

* Cross training, advanced training, honor and recognition programs.

5. Attractions

The data base has 207 articles in this category, 84% of which are about sites and 165 of them are about events (Table 1). Articles related to the tourism attributes of specific geographic areas comprised the largest share of this category (Table 3). However the combined topics of cultural, historic, and recreational (resort area) value of specific destinations together amounted to over 45% of the total information in this category.

Sites -

* Southeastern and Western U.S. most popular pleasure destination areas.

* Internationally, Europe followed by the Caribbean.

Events -

* Increased promotion of regional festivals.

IMPLICATIONS

The increasing international consciousness of the major industrialized societies of the world has far reaching implications to tourism. This is reflected in the desire of businesses to market goods and services internationally, which inevitably creates new business traveler markets. The desire to understand foreign cultures is a natural human instinct which has also historically been a major reason for travel. This desire, long constrained by nationalism and the general technological difficulties and expense of travel, is not being fulfilled by more people than ever before. This trend will bring international tourism to the forefront of the foreign policy of governments.

In business travel, corporate and association buyers will attempt to exert more control over the buying process. To accomplish this, they will rely more on computer technology and use direct reservation systems with airlines and hotels. Some companies are carrying out strict travel policies setting limits on reimbursable travel expenses.

In pleasure travel, as the dollar weakens, traveling overseas has become more expensive for Americans, while the U.S. has become a more

affordable destination for international travelers. While change in family size and composition will cause the traditional two-week vacation to slow in growth. Singles and childless couples do not have the burden of children and are freer to plan for short pleasure trips if they have the time. This increases the demand for more frequent, shorter trips such as weekend trips.

Products in the recreation category include high risk adventure (white water rafting, mountain trekking), low risk adventure (mountain biking, skiing), and culture adventure (visiting the Far East or Soviet Union). Senior travel products/services are also emphasized in the literature. Nutritional and recreational health products, special information and advertising (large letter guide books, diabetic travelers guide, etc.), and special discounts to lure their demands.

There will be cyclinal changes in frequent flier benefits, however they will continue to be a component in airline marketing strategy. Segment targeted discounting will also be a common form of promotion. Service trends in the airline industry that are passenger oriented include in-flight gifts, lounge-style seating and private compartment for business customers, airline sales reps to handle corporate accounts and improved food selections. Also airlines seem to be doing a better job of training agents on new or updated reservation systems.

The plentiful supply of ships will keep cruise prices competitive relative to other types of pleasure and even conference business. From 1980 to 1987, this industry experienced an average growth rate of 9%, and a 12%-14% in 1988 (7). Cruise travel is expected to continue increasing as advertising expenditures will double by the mid-1990's (5). As the demand increases, so will the competition among lines.

The expansion and renovation of airports is a result of expected increases in airline travel during the next 20 years. None of the articles made a specific prediction for increased passengers, but several made reference to the anticipated growth as a reason for expanding and renovating airport facilities. To correct delays, airlines are readjusting departure schedules to allow for congestion in busy airports.

Most major cities have convention centers and are expanding their facilities to stay competitive in the meeting destination business and to maximize economic impact in the community. Smaller conference centers are also being built, especially in communities that cannot afford to build a major convention center. Because of the intense competition in the lodging industry, tourists are benefiting from discounted rates via a variety of packages; honeymoon, golf, tennis, senior citizen, family, theme weekends, discounts for volume business, frequent guest programs, extensive amenities, non-smoking rooms, and special rates for services for small meetings. Emerging trends for pleasure- tourist-lodging include increased competition from condominiums in resort areas, country hospitality inns, and all-suites in all price ranges.

The data base supports the national trend towards the consumption of lighter foods. The trend is exemplified by a shift in demand to seafood, chicken, lamb, veal, exotic salads, lighter alcoholic drinks, and smaller portions. Despite the concern for health and nutrition, there is still

demand for exotic desserts, especially chocolate ones. Other food trends include emphasis on ethnic foods, "home style" cooking and interest in regional foods.

The tourism industry is addressing the labor shortage problem in several ways. Besides hiring more women, senior citizens, and minorities, cross training seems to be most successful in lodging and foodservice positions. Training employees to perform a variety of tasks reduces apathy and is more cost effective than hiring additional people. Advance training provides motivation and reduces turnover by keeping employees up to date in their respective fields.

In the domestic destinations, information available within the database concurs with USTDC (13) which shows that the Southeastern and Western U.S. are the most popular regions. These two regions include Florida, California and Hawaii. The sunshine, beaches and theme parks are their biggest resources. The Sunbelt region is still favored by travelers. In overseas destinations, Europe still has the lead, followed by the Caribbean. However, Oceania and Asia are the rising stars. Oceania was the focus of the second largest amount of articles (mainly about Australia and New Zealand) in the data base. With its mystique, Asia provides a perfect destination for adventure travel, it experienced a growth of 84% over the past five years and takes the third largest amount of articles in the data base (15).

CONCLUSION

The international focus will be reflected in the demand for adventure travel including travel to more remote destinations. The governments in these nations will seek out capital to build their tourism infrastructure providing opportunity for investors. However, entrepreneurs investing in properties in third world nations are advised to think of their investments as being relatively short term when compared to their investments in more economically and politically stable countries. These countries will usually be open to foreign investment during the early years of a property's life, since it is to their economic benefit to have these types of businesses within their economic system and they cannot provide the necessary assets themselves. But it has been noted that hotels can be symbols of economic wealth and as such, the focus of local ire (2). It is therefore recommended that foreign investors plan for the strategic take over of management by locals, and later on, the sale of the properties to local interests.

In the U.S. the need for capital to build and expand tourism infrastructure is also great. At the state and local level competition for tourists has become fierce. It is expected that to a large extent, capital for this purpose will come from entrepreneurs and from citizens of local communities rather than state and federal governments. In communities where tourist demand is healthy and where the community has adequate safeguards against pollution and crime, the database indicates that investors are continuing to be drawn by the prospect of profit in the tourism industry.

Despite the fact that the hotel industry in most communities is saturated, the database shows that wherever there is an expanding airport and/or convention center, lodging facilities are expanding or renovating. Food service and retail outlets are showing similar trends. However, the expansion of this infrastructure is tempered by tourist demand for economy and value in destination services, facilities, and attractions. Of major interest to marketers will be the information in the "Tourist Demand" and "Attractions" categories of this database. By synthesizing this information the marketer will acquire a better feel for the components of destinations that potentially produce value for tourist.

The trends process is a systematic way of categorizing the factors in the environment which impact the tourism industry. Since it is impossible to separate the host society from tourism, the marketer must first understand the social, economic, political, and technological trends which are impacting the host society and therefore the tourism industry's strategic position in society. Second, as tourism marketers seek to carve out their competitive position in the tourism marketplace, knowledge of current trends in tourism demand, the actions and activities of tourism support services, the linking or communications component, the attractions, and the overall image of the particular destination becomes invaluable. One practical use of the electronic database is that by cross referencing. For example, by cross referencing the category attractions with the category of services/facilities , the resercher can draw the link between the strength of a destination's image and the extent of development of its tourism industry. The trends process offers marketers a bird's eye view of the trends in the tourism environment. From this vantage point the ways in which these trends interconnect to form opportunities for the fulfillment of customer needs can be observed.

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TABLE 1
AMOUNT OF EDITORIAL SPACE GIVEN TO EACH CATEGORY OF THE
GENERAL ENVIRONMENT WITHIN SELECTED TOURISM JOURNALS

CLASSIFICATION	# OF ARTICLES	WT. OF ARTICLES	% OF CLASSIFIC.
SOCIOCULTURAL			
EDUCATION	122	476	79%
LIFESTYLE	14	64	11%
PSYCHOGRAPHIC	14	52	9%
DEMOGRAPHIC	1	5	1%
TOTAL	151	597	
% OF THE GENERAL ENVIRONMENT			43%
POLITICAL			
LAW & REGULATION			
JURISDICTIONAL	4	16	7%
LEGISLATIVE	17	27	11%
ADMINISTRATIVE	40	90	37%
SUBTOTAL	61	133	55%
LOBBYING			
JURISDICTIONAL	4	11	4%
LEGISLATIVE	22	62	25%
ADMINISTRATIVE	13	38	16%
SUBTOTAL	39	111	45%
TOTAL	100	244	
% OF THE GENERAL ENVIRONMENT			29%
ECONOMIC			
GNP	4	13	13%
FISCAL POLICIES	7	12	12%
MONETARY POLICIES	4	6	6%
LABOR	6	23	23%
TRADE	17	45	46%
TOTAL	38	99	
% OF THE GENERAL ENVIRONMENT			11%
TECHNOLOGY			
FOOD	0	0	0
EQUIPMENT	6	22	12%
COMPUTER/ELECTRIC	28	78	44%
ENERGY	1	1	1%
FACILITIES/CONSTRUCTION	8	25	14%
COMMUNICATION	9	22	12%
MAINTENANCE	3	15	8%
SUPPLIES	0	0	0%
SAFETY	3	9	5%
TRANSPORT/DISTRIBUTION	2	7	4%
TOTAL	60	179	
% OF THE GENERAL ENVIRONMENT			11%

TABLE 2

AMOUNT OF EDITORIAL SPACE GIVEN TO EACH CATEGORY OF THE SPECIFIC TOURISM ENVIRONMENT WITHIN SELECTED TOURISM JOURNALS

CLASSIFICATION	# OF ARTICLES	WT. OF ARTICLES	% OF CLASSIFIC.
TOURIST			
BUSINESS	130	433	72%
PLEASURE	47	156	26%
PERSONAL	4	12	2%
TOTAL	181	601	
% OF THE SPECIFIC ENVIRONMENT			16%
INFORMATION/DIRECTION			
PRODUCT	116	339	47%
PRICE	14	30	4%
PLACE	96	208	30%
PROMOTION	75	133	19%
TOTAL	301	710	
% OF THE SPECIFIC ENVIRONMENT			26%
TRANSPORTATION			
LAND	43	89	25%
SEA	33	62	18%
AIR	111	203	57%
TOTAL	187	354	
% OF THE SPECIFIC ENVIRONMENT			16%
SERVICES/FACILITIES			
FACILITIES	83	161	25%
LODGING	151	275	44%
FOODSERVICES	17	56	9%
HUMAN RESOURCES	39	140	22%
TOTAL	290	632	
% OF THE SPECIFIC ENVIRONMENT			25%
ATTRACTIONS			
SITES	164	623	84%
EVENTS	43	116	16%
TOTAL	207	739	
% OF THE SPECIFIC ENVIRONMENT			17%

TABLE 3
TOURISM SPECIFIC TOPICS
WITHIN THE TOURISM JOURNALS OF 1988

# OF ARTICLES	WEIGHT OF ARTICLES	% OF CATEGORY	
			TOURIST
231	796	61.95%	CONVENTION/MEETING
24	72	5.60%	PRIVATE BUSINESS
7	15	1.17%	GOVERNMENT BUSINESS
50	138	10.74%	VACATION
3	7	0.54%	WEEK-END
46	156	12.14%	SPORTS/RECREATION
8	22	1.71%	HEALTH
23	79	6.15%	EDUCATION/CULTURAL
			INFORMATION/DIRECTION
74	132	12.92%	TOUR OPERATION
111	245	23.97%	TRAVEL AGENCY
35	53	5.19%	ADVERTISING
1	1	0.10%	WELCOME CENTER
214	504	49.32%	MARKETING
36	87	8.51%	ADMINISTRATION
			TRANSPORTATION
159	304	52.87%	AIRLINE/AIRPLANE
4	7	1.22%	MOTOR COACH
11	22	3.83%	TRAIN
31	61	10.61%	AUTOMOBILE
7	32	5.57%	RECREATIONAL VEHICLE
43	102	17.74%	CRUISE SHIP
27	47	8.17%	TECHNOLOGY (RELATED TO TRANSPORTATION)
			SERVICES/FACILITIES
3	5	0.57%	ROAD/HIGHWAY
47	86	9.75%	AIRPORT
3	7	0.79%	PUBLIC UTILITIES
1	5	0.57%	GASOLINE
157	354	40.14%	LODGING
21	73	8.28%	FOODSERVICES
11	29	3.29%	TOUR/TRAVEL GUIDE
25	76	8.62%	ENTERTAINMENT
115	247	28.00%	FACILITY
			ATTRACTIONS
39	146	13.83%	HISTORIC
64	209	19.79%	CULTURAL
13	44	4.17%	SHOPPING
19	92	8.71%	PARKS
8	23	2.18%	THEME PARKS
40	127	12.03%	RESORT AREA
115	415	39.30%	GEOGRAPHIC