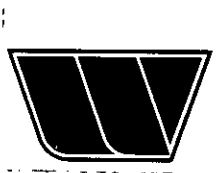


TOURISM ON OUR TERMS:
Tourism in the Western United States

John Hunt
University of Idaho

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Western Governors' Association

TOURISM IN THE WESTERN UNITED STATES

Prepared by

Dr. John D. Hunt
University of Idaho
College of Forestry, Wildlife and Range Sciences
Department of Resource Recreation and Tourism
Moscow, Idaho 83843

Prepared for

The Western Governors' Association
600 17th Street
Suite 1705 South Tower
Denver, Colorado 80202-5442
(303) 623-9378

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FOREWORD

by Governor George S. Mickelson, South Dakota

As Chairman of the Western Governors' Association this year, it has given me great pleasure to place a high priority on tourism in the West. South Dakota has seen clear evidence of the importance of tourism to a state's economy -- the 50th anniversary of Mt. Rushmore, the popularity of the movie *Dances With Wolves*, the boom in Deadwood resulting from gaming, and the phenomenon called Sturgis all have highlighted the boon, and a bit of the bane, this industry provides us.

The work that has been done by WGA's three Scholars-in-Residence this year -- John Hunt, Pat Long and Karl Kim -- alerts us to many other opportunities and challenges resulting from tourism. Remembering and celebrating our heritage, preserving our community integrity, playing together, learning about others, protecting our special environments -- all these and more can be gained through thoughtful tourism planning. Of course, the other side of the coin is that if we don't provide thoughtful management, we could lose these opportunities or, worse yet, ruin that which we want to strengthen.

In South Dakota I have responded by elevating tourism to a full Cabinet level department. This report by John Hunt and the others by Pat Long and Karl Kim provide many ideas for us to think about as we go forward. John's report is the first of the three. It provides a broad framework for thinking about tourism: its importance nationally, its importance to the West, concerns people have regarding tourism, policies which we need to have in place to do a good job in taking advantage of tourism's benefits.

Pat Long's report addresses the special needs and opportunities of rural tourism and Karl Kim draws on Hawaii's experiences to identify lessons other states can learn as their tourism industry matures.

Having these three scholars work with WGA has been an exceptional experience, one which is manifested in the quality of their work.

EXECUTIVE SUMMARY

TOURISM IN THE WESTERN UNITED STATES

- O Tourism is a broad-based, pervasive activity which embraces the needs of the tourist, the industry which responds to his needs, and the impact both he and the industry have on the host socio-cultural, economic and physical environments.
- O Contemporary tourism development must be founded upon every effort to optimize its social, economic and environmental benefits while minimizing or mitigating its costs.
- O It is critical that tourism development strive to:
 1. Maximize tourist or visitor satisfaction.
 2. Provide rewards to owners within both the private and public sectors.
 3. Protect, preserve and properly manage the natural, historical and cultural resources which form the attractions base for tourism.
 4. Respect the values and needs of the residents of host communities.
- O The western United States accounted for approximately 30 percent of the travel by Americans in the United States during 1989.
- O Travel to and within the western United States was unevenly distributed among the sub-regions with the Pacific states receiving over 45%, followed by the Mountain region with nearly 30% and the West North Central region accounting for the remaining 25%.
- O In 1987, domestic travelers spent approximately \$83.5 billion in the western United States. This amounted to slightly less than one-third of total expenditures made in the U.S. by domestic travelers.
- O Domestic travel expenditures generated more than \$4.7 billion in state and local tax receipts and accounted for the equivalent of over 1.5 million jobs in the West.
- O In 1989, international visitors to the western United States contributed another \$14.3 billion in expenditures and accounted for nearly 300,000 additional jobs. In the case of international expenditures, the West received a larger proportion (41%) of the total than was the case for domestic expenditures.

- 0 The relative importance of tourism in the west is particularly high. The Mountain and Pacific regions rank 1 and 3, respectively among the nine Bureau of the Census regions in per capita tourism receipts.
- 0 The individual western states are characterized by variations in tourism dependency. While only seven of the 18 states rank in the top 25 in total travel expenditures, 15 of 18 rank among the top 25 states in tourism dependency.
- 0 Domestic tourists traveling to and within the western United States are extremely varied. As a whole they are quite different from visitors to other regions of the nation.
- 0 International travel to the west is growing. Mexico, Canada, Japan and western Europe constitute important markets for the western United States.
- 0 There are a set of issues or challenges common to the tourism industry throughout much of the West. They range from a lack of understanding of tourism and its values and impacts, lack of cooperation and coordination within the industry, lack of education and training programs and lack of comprehensive tourism marketing, development and management planning and policy to poor, inadequate highway information and direction signing, lack of research data and information, poor public transportation and conflict between tourism development and environmental and social interests.
- 0 Existing state tourism policies and programs are relatively narrow. Majority of emphasis is on tourism marketing and promotion with only limited attention devoted to comprehensive planning, product development and management.
- 0 States appear poised to assume leadership role in tourism. However, to do so, they must adopt broader tourism policies and programs.
- 0 Recommendation I: It is recommended that all western states adopt broad-based tourism policies which embrace the basic goals of tourism development.
- 0 Recommendation II: It is recommended that western states adopt dynamic, state-wide comprehensive tourism planning processes.
- 0 Recommendation III: It is recommended that states develop capacity management strategies which will assure that the negative impacts of tourism are reduced, minimize or mitigated.
- 0 Recommendation IV: It is recommended that western state tourism offices take a more active role in tourism human and product development.

- 0 Recommendation VI: It is recommended that western states expand their tourism research activities to entail a more extensive and broader array of research.
- 0 Recommendation VII: It is recommended that western states expand their activities in tourism education at all levels.
- 0 Recommendation VIII: It is recommended that western state tourism offices take more aggressive leadership in coordinating and linking the many components of the tourism industry.

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TOURISM IN THE WESTERN UNITED STATES

Dr. John D. Hunt
Department of Resource Recreation and Tourism
University of Idaho
Moscow, Idaho 83843

THE INTRODUCTION:

A DEFINITION AND A PHILOSOPHICAL FOUNDATION

In 1978, the authors of the National Tourism Policy Study Final Report, wrote:

The National Tourism Policy Study, like any study or inquiry, has required definitions of the various phenomena under study. The task of defining the various activities and organizations central to the study has not been easy. Many of the commonly used terms in tourism and recreation have nebulous meanings and lack consensus of definition, even among business and government leaders who work in tourism, travel, and recreation on a day-to-day basis.

In the Summer, 1991 issue of the Journal of Travel Research, this author revisits the issues of definitions and terminology only to conclude that there is still not an accepted, universal definition for tourism. Like the authors of the Policy Study report who concluded that, "...controversy and confusion over the meaning of tourism..." stem primarily from an inability to agree "...on explicit common definitions..." and "controversy over the emotional or connotative meaning attributed to terms when used to

refer to real-world activities and organizations," today's writer of tourism is met with similar problems.

The first issue, that of agreeing on a common definition, is critical to provide a foundation or basis upon which an objective analysis of the empirical character of tourism can be made. In the case of this work, the broadest possible conceptual definition of tourism is employed. That is, that tourism constitutes the activity of people traveling away from home for any purpose except commuting to and from work or school. Dr. Jafar Jafari offers an equally general and broad, but more meaningful and all-encompassing definition:

The study of man away from his usual habitat, of the industry which responds to his needs, and of the impacts that both he and the industry have on the host socio-cultural, economic, and physical environments.

Unfortunately, quantifying the activity of tourism often requires a more rigid, operational definition which incorporates thresholds or parameters that allows one to make more exacting descriptions and comparison of its nature and magnitude. Thus, because the majority of the empirical evidence offered here comes from the U.S. Travel Data Center, the tourism industry's only national, non-profit research center, it is appropriate to use its definition of travel. That is, that travel or tourism (the terms "travel" and "tourism" are synonymous and interchangeable here), constitutes the activity of people traveling away from home 100 miles or more or less than 100 miles but staying a least one night away from home in paid accommodations.

In accepting this definition, it is important to remember that travel which may not fall within its boundaries, yet constitutes people "traveling away from home," is significant. As such the opportunities, challenges, income and cost of tourism are probably much greater than is either implicitly or explicitly understood from much of the empirical information that follows.

The second issue often confronting a treatment of the topic of tourism is the emotional or connotative meanings attached to tourism which may bias either the writer or the reader. Again, the authors of the National Tourism Policy Study Final Report said it well when they noted:

Both tourism and travel may connote a number of different things to different people, including pleasure versus business, sightseeing, adventure, economic opportunity, leisure, change, relaxation, education and expansion of horizons, as well as congestion, exploitation, energy consumption, pollution, litter, high prices, and over-development. Tourism, in particular, however, tends to have polarized connotations for many, among both the general public and government officials.

At the same time, however, the Policy Study report authors recognized that the attitudes toward tourism were more than emotional reactions to terminology:

Unfortunately, while semantic usage may reinforce negative images or attitudes, many of the semantic problems associated with tourism and travel are symptomatic of more deep-seated causes. Some of these causes may be the overt actions of people who travel and those who service them, while other causes may simply be conflicts in values. Although the benefits of travel are vast and varied, including personal, social, economical, educational and cultural benefits, travel is also costly. Often these costs are social and environmental. Depending on one's role in travel and tourism, it is easy to lose sight of either the costs or the benefits.

Although it would be simplistic to believe that benefits of travel only accrue to the buyer and seller of travel, it would be equally naive to suggest that the costs are similarly restrictive. Travel and tourism are complex and all pervasive. They touch and are touched by many facets of our lives, our society, and our environment.

The treatment that follows is founded upon a belief and understanding reflected in the paragraphs above. While much of what is presented represents the income or beneficial side of the tourism ledger, the absence or more limited treatment of the expense or cost side is in no way intended to discount its importance to the future of the communities and peoples of the West or those who may have the opportunity to visit there.

Also pervasive throughout this discussion, particularly in attempting to analyze and recommend western tourism policy, is a set of goals to guide tourism development. Originally, they were put forward by Dr. Clare Gunn, Professor Emeritus, Texas A&M University. They have been slightly, but not significantly, modified by this author.

In a nutshell, contemporary tourism development must be founded upon every effort to optimize its social, economic and environmental benefits while minimizing or mitigating its costs. To do so, it is critical that tourism development strive to:

1. Maximize tourist or visitor satisfaction. Every effort must be made to meet or exceed visitor expectations for the travel experience.
2. Provide rewards to owners within both the private and public sectors. Business must be given a fair

opportunity to make a profit. Government organizations or stewards of public products and services must be able to provide products and services which are socially, politically and economically worthwhile.

3. Protect, preserve and properly manage the natural, historical and cultural resources which form the attractions base for tourism.
4. Respect the values and needs of the residents of host communities.

Tourism, as a social and economic activity, has come of age. It cannot be denied; it will not go away. While the residents of some communities may desire to lock out tourists, they will refuse to be locked out of the communities and places they desire to visit. As tourism comes of age there also comes a realization that like most other social and economic activities there are limitations and costs. However, within these limitations are ways to develop and manage tourism to provide the best it has to offer while keeping costs at a minimum.

Where tourism development is concerned, the western United States has a great deal to gain. At the same time, it and those who live and visit in the West have a great deal to lose. The West is a virtual cornucopia of the best there is to be offered to the visitor. It stands to benefit from the economic activity generated by an active and viable visitor industry. Tourism can provide economic diversity and supplement the western resource-extractive- and agricultural-based economies. It can serve as the stimulus

to preserve much of the fragile natural and cultural heritage of the region.

At the same time, the ability of small, rural communities to sustain tourism development is limited. While major urban areas have a relatively high carrying capacity for tourism, small communities, characteristic of much of the western United States, are easily impacted and disrupted by relatively small changes in the status quo. For the past 100 years, miners, loggers, farmers, and ranchers have shaped the face of the West and its communities. In the coming decade, tourists and those who serve their needs will increasingly mold the region's social, economic and environmental complexion.

**THE MAGNITUDE AND CHARACTER OF TOURISM
IN THE WESTERN UNITED STATES**

The Tourism Product

There are few, if any, places in the world which have the diversity and quality of touristic attractions and appeal as does the western United States. While some regions of the world may have unique, single characteristics and attractions which match or surpass similar attractions in the West, no region can boast a combination or diversity which even approaches that of the western United States.

The West contains some of the largest, most dramatic and least accessible wild lands in the world. At the same time, the region is dotted with relatively large, contemporary cities representing broad cultural, ethnic, architectural, and historical diversity. It has the highest and lowest spots in the United States, as well as the driest and wettest places. Tropical islands, with palm tree-lined beaches, slowly give way to iceberg sprinkled bays lined by slow moving, but never ending, glaciers. Here is found a diversity and magnitude of national parks which represent a set of "crown jewels" unrivaled the world over. At the same time, man's most vivid imagination comes to life in some of the world's most exciting high-tech playgrounds. The West is typified by landscapes

ranging from high, snowcapped mountain ranges with world-class ski areas to multi-colored desert areas harboring villages and artifacts of mysterious early inhabitants.

Although it is hardly necessary to document the superb touristic character of the western United States, it is interesting to note that it comprises places which are among the most nearly ideal vacation destinations in the United States. In the early 1970's, when dreams of many people began to turn to travel, several scholars undertook to investigate the perceptions and images that places held in the mind's eye of Americans. Ed Mayo, at the time a professor of marketing at Purdue University, undertook a series of national studies designed to 1) identify some of the components considered important in choosing a vacation destination, 2) measure the level or degree of these components which comprised the "ideal" vacation destination, and 3) then determine which regions of the United States were perceived to provide vacation opportunities closest to that of the "ideal" vacation destination. Clearly, the West was ranked as the region thought to most resemble the ideal vacation destination in the United States.

Others have undertaken perceptual and image studies of tourist destinations and the West. Several of its states, and particular destination, are consistently ranked among the best places to visit on a vacation. At the same time, there are places within the region which have relatively poor or less desirable images. However, on the whole, the West is probably perceived to contain more than any other region in North America, and, possibly the

world, of what is thought to be the best in tourist attractions. It is a vast, colorful and exciting region which defies comparison.

The Tourism Activity

According to the U.S. Travel Data Center, in 1989, domestic travelers made 202.1 million trips away from home of 100 miles or more or overnight to or within the western United States. This amounted to 371 million person trips. The region accounted for approximately 30 percent of the travel by Americans in the United States during 1989. The travel to and within the sub-regions in the West was unevenly distributed with the Pacific states receiving over 45 percent, followed by the Mountain region with nearly 30 percent and the West North Central region accounting for the remaining 25 percent.

Nearly two-thirds of all of the domestic travel within the West was generated by residents of the region. In fact, the Pacific region receives a higher percentage (68 percent) of its visitors from its own states than does any other region in the United States. Another 24 percent of the Pacific region domestic person-trips are generated by residents of the Mountain region. On the other hand, the Mountain region gets only 44 percent of its visitors from its own region, ranking it second from the bottom in the percentage of person trips generated by residents within a region. It gets 12 percent and 10 percent from the Pacific and West North Central regions respectively. The West North Central region generates 54 percent of its person trips from within the region. From four to eight percent of its person trips come from

the East South Central, East North Central, West South Central and Mountain regions.

In 1987, domestic travelers spent approximately \$83.5 billion in the western United States (Table 1). This amounted to slightly less than one-third (30 percent) of total expenditures made in the United States by domestic travelers. These expenditures generated more than \$4.7 billion in state and local tax receipts and accounted for the equivalent of over 1.5 million jobs. In 1989, international visitors to the western United States contributed another \$14.3 billion in expenditures and accounted for nearly 300,000 additional jobs. In the case of international expenditures, the West received a larger proportion (41 percent) of the total than was the case for domestic expenditures.

Much like the actual travel within the region, the gross economic impact is unevenly distributed among the sub-regions within the West. However, the Pacific states get a disproportionately large share of the expenditures and jobs from tourism.

Although these figures alone are impressive, they become more meaningful and enlightening when compared to other regions of the United States. Of the nine Bureau of the Census regions the Pacific region ranks relatively high in domestic trips (2nd) and expenditures (2nd) and foreign expenditures (1st). On the other hand, the two other Census regions within the West rank relatively low. The West North Central ranks seventh in both domestic trips and expenditures and eighth in expenditures by foreign visitors.

TABLE 1. TOTAL DOMESTIC (1987) AND INTERNATIONAL (1989) TRAVELER EXPENDITURES, NATIONAL SHARE AND RANK AND REGIONAL SHARE AND RANK, WESTERN UNITED STATES.

State	Dom. Exp. (mil. \$)	Intl. Exp. (mil. \$)	Total (mil. \$)	Natl. Rank	Natl. Share (%)	Region Rank	Region Share (%)
ALASKA	857	46	903	46	0.29	15	0.92
ARIZONA	5,635	543	6,178	14	2.00	3	6.31
CALIFORNIA	35,797	7,658	43,455	1	14.05	1	44.42
COLORADO	5,455	424	5,879	17	1.90	5	6.01
HAWAII	3,301	2,772	6,073	16	1.96	4	6.21
IDAHO	1,061	74	1,135	44	0.37	13	1.16
KANSAS	2,168	65	2,233	34	0.72	10	2.28
MINNESOTA	5,551	304	5,855	18	1.89	6	5.98
MONTANA	728	217	945	45	0.31	14	0.97
NEBRASKA	1,359	28	1,387	42	0.45	12	1.42
NEVADA	8,247	957	9,204	8	2.97	2	9.41
NEW MEXICO	1,918	69	1,987	38	0.64	11	2.03
NO. DAKOTA	647	78	725	50	0.23	18	0.74
OREGON	2,794	196	2,990	29	0.97	8	3.06
SO. DAKOTA	626	120	746	49	0.24	17	0.76
UTAH	2,148	173	2,321	32	0.75	9	2.37
WASHINGTON	4,469	562	5,031	21	1.63	7	5.14
WYOMING	760	27	787	47	0.25	16	0.80
REG. TOTALS	83,521	14,313	97,834		31.62		100.00
NATL. TOTALS	275,158	34,198	309,356		100.00		

Source: U.S. Travel Data Center. The domestic and international travel expenditures are generated from different economic impact models. The model used to generate 1987 estimates is being revised. It is anticipated that when the revised 1987 and new 1989 domestic travel expenditures are released that changes will occur among some states. Overall, the revised estimates of domestic travel are anticipated to be somewhat lower than the original estimates. Nonetheless, it is anticipated that the relative positioning of most states will remain similar.

The Mountain regions ranks seventh in domestic trips, fifth in expenditures by domestic travelers and fifth in foreign expenditures.

The Relative Economic Importance of Tourism

Far more telling for measuring the economic significance of tourism in a region than is the absolute magnitude of expenditures and visitors is the relative economic importance among regions or states. That is, to get a better measure of the importance of tourism it is important to adjust the figures by some common denominator such as resident population and per capita personal income. Essentially, by calculating per capita tourism receipts in a state or region it is easier to understand the relative importance of tourism to personal economic wealth or gross product. Relative economic importance can be further refined by examining per capita tourism receipts as a ratio of per capita personal income. This is called the Tourism Impact Factor.

Generally speaking, the assumption is that the higher the Tourism Impact Factor or ratio of per capita tourism receipts to per capita personal income the greater is the impact of tourism on the economic wealth of a region and its residents. Usually, places with a relatively low TIF have more diversified economies or are less dependent on tourism. Obviously, there are other factors such as different income multipliers and levels of leakage among states or regions which effect the accuracy of these measures for determining the relative economic importance of tourism. Nonetheless, the Tourism Impact Factor or per capita tourism

receipts provide a far better measures for making comparisons than do total tourism receipts, expenditures or visitation in a region. For example, in California, often touted as the nation's tourism state with expenditures approaching \$50 billion representing over a 14% share or number one rank of expenditures in the nation, tourism is less significant than in Wyoming which receives expenditures of only \$800 million ranking it 47th among the 50 states. While tourism is important to California both its per capita tourism receipts and Tourism Impact Factor are lower than are Wyoming's.

As a whole, tourism is relatively economically important to the western states when compared to the rest of the nation. More significantly, the Mountain and Pacific regions rank 1 and 3, respectively among the nine Bureau of the Census regions in per capita tourism receipts. The West North Central region which contains some of the states considered a part of the larger western region ranks in 6th place. The South Atlantic region ranks 2nd in per capita tourism receipts; however, Florida, which is particularly high and extremely unique from the other states in the region, grossly distorts the regional data. Likewise, California and Nevada tend to be unique from other states in the Pacific and Mountain regions. However, if they are removed from the calculations, the Mountain region maintains its first position in per capita tourism receipts, the Pacific region moves into second place and the South Atlantic drops into 5th place.

In the final analysis, it seems clear that tourism is relatively more important to the western United States than to the remainder of the nation. There are obvious isolated exceptions such as Florida, Maine, New Hampshire and Vermont where tourism is particularly important.

Because of the importance of tourism to the West it is paramount that it be given particular attention in future planning and development of the region. While the future of the region will not necessarily rise or fall with the prosperity of tourism, it will very much be shaped by the vagaries and impacts of tourism. The issue of tourism becomes increasingly important when it is recognized that much of the West is rural and rural areas and communities generally have a higher sensitivity to tourism. They are relatively more susceptible to both the benefits and costs of tourism. They have a lower carrying capacity than do cities. They have relatively more to gain from tourism than do most urban areas. Likewise, they have more to lose.

Obviously, the individual western states are characterized by variations in tourism dependency (Tables 2 and 3). While only seven of the 18 states rank in the top 25 in total travel expenditures, 15 of 18 rank among the top 25 in tourism dependency or Tourism Impact Factor. The western states range from first to 43rd in TIF.

On a regional basis the states seem to cluster into four groups or levels of tourism dependency. Nevada and Hawaii have extremely high Tourism Impact Factors. Nevada in fact stands

TABLE 2. TOTAL DOMESTIC (1987) AND INTERNATIONAL (1989) TRAVELER EXPENDITURES, POPULATIONS (1987), PER CAPITA TOURISM RECEIPTS AND TOURISM IMPACT FACTORS, WESTERN UNITED STATES.

State	Dom. Exp. (mil. \$)	Intl. Exp. (mil. \$)	Total (mil. \$)	Pop. (thou.)	Per Cap. Travel Rec. (\$)	Per Cap. Income (\$)	TIF ¹	TIF Rank
ALASKA	857	46	903	525	1,720	19,079	9.02	9
ARIZONA	5,635	543	6,178	3,386	1,825	14,970	12.19	3
CALIFORNIA	35,797	7,658	43,455	27,663	1,571	18,753	8.38	12
COLORADO	5,455	424	5,879	3,296	1,784	16,463	10.83	6
HAWAII	3,301	2,772	6,073	1,083	5,608	16,753	33.47	2
IDAHO	1,061	74	1,135	998	1,137	12,665	8.98	10
KANSAS	2,168	65	2,233	2,476	902	15,759	5.72	18
MINNESOTA	5,551	304	5,855	4,246	1,379	16,674	8.27	13
MONTANA	728	217	945	809	1,168	12,866	9.08	8
NEBRASKA	1,359	28	1,387	1,594	870	14,774	5.89	17
NEVADA	8,247	957	9,204	1,007	9,140	17,511	52.20	1
NEW MEXICO	1,918	69	1,987	1,500	1,325	12,488	10.61	7
NO. DAKOTA	647	78	725	672	1,079	12,833	8.41	11
OREGON	2,794	196	2,990	2,724	1,098	14,885	7.37	15
SO. DAKOTA	626	120	746	709	1,052	12,755	8.25	14
UTAH	2,148	173	2,321	1,680	1,382	12,193	11.33	5
WASHINGTON	4,469	562	5,031	4,538	1,109	16,473	6.73	16
WYOMING	760	27	787	490	1,606	13,609	11.80	4
REG. TOTALS	83,521	14,313	97,834	59,396	1,647	16,952	9.72	
NATL. TOTALS	275,158	34,198	309,356	243,419	1,271	16,489	7.71	

¹TIF = Tourism Impact Factor

TIF = $\frac{\text{Per Capita Travel Receipts} \times 100}{\text{Per Capita Personal Income}}$

where, Per Capita Travel Receipts = $\frac{\text{Total Travel Expenditures in State}}{\text{Population}}$

TABLE 3. NATIONAL AND REGIONAL RANKINGS OF TRAVEL EXPENDITURES, PER CAPITA TRAVEL RECEIPTS AND TOURISM IMPACT FACTORS (TIF); WESTERN UNITED STATES.

State	Total Travel Expenditures ¹		Tourism Impact Factor ²	
	Natl.	Reg.	Natl.	Reg.
ALASKA	46	15	14	9
ARIZONA	14	3	6	3
CALIFORNIA	1	1	17	12
COLORADO	17	5	9	6
HAWAII	16	4	2	2
IDAHO	44	13	15	10
KANSAS	34	10	43	18
MINNESOTA	18	6	18	13
MONTANA	45	14	13	8
NEBRASKA	42	12	41	17
NEVADA	8	2	1	1
NEW MEXICO	38	11	10	7
NO. DAKOTA	50	18	16	11
OREGON	29	8	25	15
SO. DAKOTA	49	17	19	14
UTAH	32	9	8	5
WASHINGTON	21	7	29	16
WYOMING	47	16	7	4

¹A high rank (low number) indicates a relatively high total traveler expenditure.

²A high rank (low number) represents a relatively high economic dependency on tourism in the state's economy. In other words, the ratio of tourism income to personal wealth or income and gross state product is relatively high in the state.

distinctly alone with a TIF nearly 56 percent greater than Hawaii. Nonetheless, the Hawaii TIF is nearly three times greater than any of the states which fall in the second cluster. Interestingly, the second cluster of states is predominately Mountain region states and includes Arizona, Colorado, New Mexico, Utah and Wyoming.

The third cluster of states are geographically more diverse. They are somewhat lower in tourism dependency than the top two clusters but are still clearly more dependent than most other states in the United States. This group includes Alaska, California, Idaho, Minnesota, Montana, North Dakota, Oregon and South Dakota.

The fourth group of western states with relatively low tourism dependency in both the region and the nation comprises Kansas, Nebraska and Washington. However, Washington is somewhat isolated, ranking 29th in TIF in the nation, while Kansas and Nebraska come in at 43rd and 41st, respectively.

Tourism is economically important to all of the western states. However, there are states within the region in which tourism is significantly more important. Even those few states which may appear to have relatively low dependency on tourism may find the need to pay increasing attention to tourism because of their predominately rural character or as major changes occur in their traditional economic bases.

Tourist Characteristics--The Domestic Markets

Domestic tourists traveling to and within the western United States are extremely varied (Table 4). As a whole they are quite different than visitors to other regions of the nation. In addition, there are some major differences in visitors and their trip characteristics within the Bureau of the Census subregions in the West. As mentioned earlier, in 1989, Americans made over 200 million trips amounting to 371 million person trips in and to the western United States. This amounted to approximately 30 percent of all trips and person trips taken in the nation.

Like the rest of the nation the majority of travel in the West is by personal automobile, truck or recreation vehicle. However, slightly more trips to and through the region are by mass transportation. Interestingly, the subregions differ significantly from the national average and one another. For example, auto travel is significantly higher in the West North Central region than is the national average or the other subregions, while travel by air is significantly higher in the Mountain and Pacific regions.

In the case of accommodations, the West North Central and Pacific regions exhibit similarities with both lodging with friends and relatives more so than in other types of accommodations. Their use of accommodations with friends and relatives is higher than the national average. On the other hand, one half of Mountain visitors stay in hotels and motels. A large number use non-traditional types of accommodations such as tent camping.

TABLE 4. PROFILE OF DOMESTIC TRAVELERS TO AND IN THE UNITED STATES AND THE WEST NORTH-CENTRAL, MOUNTAIN, AND PACIFIC REGIONS BASED ON TRIPS, 1989. (Source: U.S. Travel Data Center)

	West			
	<u>United States</u>	<u>North-Central</u>	<u>Mountain</u> <u>Pacific</u>	
TOTAL TRIPS (mil.)	664.3	49.1	59.2	93.8
TOTAL PERSON TRIPS (mil.)	1,260.1	94.8	113.4	162.8
MODE OF TRANSPORT (%)				
(* = less than one %)				
Auto, Truck, RV	78	89	70	73
Airplane	19	10	27	24
Bus	2	1	2	1
Train	1	*	*	*
Other	3	2	3	3
LODGING TYPE (%)				
(* = less than one %)				
Friends, Relatives Homes	39	43	31	43
Hotel or Motel	43	41	50	36
Rented Cabin or Condo	*	*	*	*
Owned Cabin or Condo	4	5	4	2
Camper, Trailer or RV	3	3	3	4
Other	6	4	14	10
No Overnight Stay	10	9	4	9
WEEKEND TRIP (%)	46	48	46	46
VACATION TRIP (%)	70	66	75	65

TABLE 4. (continued)

(Source: U.S. Travel Data Center)

PRIMARY PURPOSE OF TRIP (%)	West			<u>Pacific</u>
	<u>United States</u>	<u>North-Central</u>	<u>Mountain</u>	
<u>Pleasure (any)</u>	75	71	78	75
Visit Friends or Relatives	38	40	30	38
Outdoor Recreation	14	14	17	17
Entertainment	24	18	31	21
<u>Business (any)</u>	18	21	17	20
Convention	4	4	5	4
Other	14	17	11	16
<u>Personal, Family, Other</u>	9	12	8	8
TRAVEL PARTY SIZE AND STRUCTURE (%)				
Household Members on Trips				
1	27	27	24	33
2	31	29	38	30
3+	41	44	37	37
Parties Without Children	68	61	71	73

TABLE 4. (continued) (Source: U.S. Travel Data Center)

DEMOGRAPHICS OF ADULT TRAVELERS	West			
	<u>United States</u>	<u>North-Central</u>	<u>Mountain</u>	<u>Pacific</u>
Marital Status (%)				
Married	59	62	62	52
Not Married	41	38	38	48
Sex (%)				
Male	54	55	58	54
Female	46	45	42	46
Average Age	41	42	42	40
Education (%)				
Less than high school complete	15	15	11	14
High school complete	33	33	34	30
College incomplete	20	20	24	20
College complete	22	20	22	24
Graduate work	10	12	10	11
Family Income (%)				
Less Than \$10,000	8	9	9	10
\$10,000-\$19,999	16	16	16	16
\$20,000-\$29,999	19	18	15	17
\$30,000-\$39,999	18	20	15	15
\$40,000-\$49,999	15	15	17	14
\$50,000-\$74,999	15	16	16	14
\$75,000-\$99,999	6	3	9	9
\$100,000 or more	4	3	3	5

The Mountain region trip purpose patterns seem to be appreciably different than the national averages and the other two subregions. For example, visiting friends and relatives and business rank lower as primary reasons for travel to the Mountain region compared to the other subregions. At the same time, travel for pleasure (in general) and entertainment (in particular) rank higher for the Mountain region. Also, the outdoor character of the Pacific and Mountain regions is manifest in a slightly higher percentage of outdoor recreation trips.

Party sizes are smaller and parties traveling without children are fewer in both the Mountain and Pacific regions. The Pacific region is characterized by a relatively higher number of non-married travelers; however, the distribution between females and males duplicates the national average. Education and income levels appear to be very similar among travelers to the West, within each region and as compared to the national averages.

International Markets - Canada

Canada is an important market for the United States and several of its regions. Although often treated and developed as if it was a domestic market, Canada represents the largest international market of travelers to the nation. In 1989, Canada represented 42 percent of all international arrivals to the United States. In the last few years, the number of visitors from Canada has been increasing at a rate of 10 percent to 11 percent per year, nearly equivalent to the growth from overseas countries. On the

other hand, with expenditure patterns more like American travelers, Canadians spent only \$4.9 billion in the U.S. which amounted to just over 10% of the total international travel receipts. Nonetheless, Canada remains a very important market to the western United States.

In 1989, Canadians made 15.4 million person visits to the United States. Six of the top 15 receiving states were in the West. More importantly, 30 percent of the person nights were spend in the western states. The Pacific and Mountain regions ranked 2 and 3 respectively behind the South Atlantic in total number of Canadian visitor nights. However, much like domestic travel to the South Atlantic, Florida overwhelmingly dominates the nine state (including Washington, DC) region by accounting for over 87 percent of the visitor nights. In the West, while California, Washington, Hawaii, Arizona and Nevada benefit the most from the Canadian market, person nights are relatively high and spread fairly evenly over Montana, North Dakota, Oregon, and Minnesota.

The following represents a brief description of recent changes in the Canadian market as quoted from the U.S. Travel and Tourism Administration, User Friendly Facts: A Resource Book 1991:

Up until recently, the Canadian market to the United States was considered a mature one. There had been a number of ups and downs from the late 1970's through the mid-1980's, with arrivals remaining between 10+ and 12+ travelers. Then, starting in 1987 there began a three year period of double digit increases, carrying the Canadian market to a new plateau of 15-17 million visits. Since the entire Canadian outbound market has seen similar increases, the U.S. share has remained about the same in recent years.

Another major issue concerns competition for the Canadian travelers among the various U.S. destinations. The record here is an interesting one. The states now receiving large numbers of Canadians, such as California, Florida, and New York, have, on average, held roughly steady for a number of years. Other states, while having relatively low visitations, have experienced fast growth rates in the number of travelers from Canada. These states include Maryland, North and South Carolina, West Virginia, and Wisconsin. Thus, there seems to be some movement toward "non-traditional" destinations.

This description, coupled with a relatively casual review of available data, would suggest that the western states as a whole may be losing Canadian market share. In 1989, for example, only six of the 18 western states had growth in Canadian person nights in excess of the national average. Seven western states, on the other hand, actually experienced declines from 1988. Half of all the states having a decline in Canadian overnights in 1989 were in the West.

Canadian travelers to the western states differ rather dramatically in their travel pattern characteristics depending on the states which they visit. For example, while Canadian travel to the United States is predominately by personal auto, truck or recreation vehicle (69 percent versus 25 percent by air); 50 percent or more of the travelers to Arizona, Colorado, Nevada, California and Hawaii come by air. At the other extreme, the states of North and South Dakota, Montana, Washington and Wyoming have more than 85 percent of their Canadian travelers arrive by personal automobile.

At the same time, while most Canadians spending one or more nights in the U.S. and the western states utilize hotels and

motels, relatively large numbers camp or stay with friends and relatives in some of the western states. Nearly one-half of the Canadian overnights in Alaska are camping. Fifteen to 30 percent of the nights in Arizona, Idaho, Montana, South Dakota, Utah, Washington and Wyoming are made in camping facilities. Arizona, California, Idaho and Washington have relatively large numbers of Canadian visitors who spend one or more nights with friends and relatives.

Most Canadian visitors to the West are on pleasure trips. However, proportionately large numbers of visitors to California, Colorado and Kansas are on business trips. Most Canadian trips to the western states are made in the April through September period (late spring, summer, and early fall); however, the sunshine states of Arizona, Nevada, Utah, California and Hawaii get more of their Canadian visitors in October through March (late fall, winter and early spring).

International Markets - Overseas

In 1989, there were just under 14 million international overseas visitors (arrivals) to the United States. Although they accounted for only 38 percent of the arrivals, they contributed 59 percent of the travel receipts (\$26+ billion). The Japanese constituted the largest group of visitors from a single overseas country, accounting for 8 percent of all international arrivals and 22 percent over overseas arrivals. In addition, the Japanese were big spenders, leaving \$6.6 billion in the United States in

1989. This amount represented 14 percent of all international travel receipts and 25 percent of all overseas country travel receipts. The travelers from the United Kingdom (2.2 million), West Germany (1 million), France (.7 million), Australia (.4 million) and Italy (.4 million) also came to the United States in significant numbers. The U.S. Travel and Tourism Administration is projecting relatively strong growth in overseas arrivals ranging from 5 to 6 percent per year through 1992. While the European countries and Japan are expected to mimic the overall growth rate, arrivals from Australia are expected to increase at rates ranging from 11 to 14 percent.

In 1989, it is estimated that nearly 78 percent of the overseas visitors to the United States visited one or more of the western states. California receives more overseas visitors than any other state in the nation. Hawaii and Arizona also rank among the top ten states visited by overseas travelers. At the same time, Alaska, Idaho, Montana and Nebraska rank very near the bottom in the number of overseas visitors.

Of the overseas markets, Australia, France, Germany, Japan and the United Kingdom are particularly important to the western states. Visitors from these markets exhibit different characteristics (Tables 5, 6 and 7). Likewise, visitors from each country who visit the different regions of the West exhibit different trip and personal characteristics. For example, French visitors to the West are more frequently on a vacation than is the case for all visitors to the nation. However, the West North

Central region receives above average proportion of business and relative visiting travelers than do the Mountain, Pacific and Pacific Island regions. French visitors to these latter regions are more predominately on vacation than is the case for the national average or the West North Central region.

On the other hand, the visitors from Germany to each of the subregions in the West are less likely to be on business. Unlike the French, German visitors seldom visit the West North Central region on business. On the other hand, with the exception of those Japanese visitors who visit the Pacific Islands, relatively high proportions who visit the West are on business with the West North Central region receiving a very high proportion of business travelers. Interestingly, proportionately more United Kingdom travelers are on business trips to the U.S. than is the case for any of the other four overseas markets examined. However, those visiting the Mountain, Pacific and Pacific Island regions are an exception with the overwhelming majority on vacation. The regional trip purpose pattern for Australian visitors is very similar to those from the United Kingdom. As a whole, a smaller proportion visit the U.S. for business.

Shopping and sightseeing are the big activities for most overseas visitors to the United States. They are certainly important in the West, although shopping is about on par with the U.S. average, sightseeing is relatively more important among visitors to the West. Other differences in leisure and recreational activities between markets and within markets but

TABLE 5. PROFILE OF INTERNATIONAL VISITORS TO THE UNITED STATES AND THE WEST NORTH-CENTRAL, MOUNTAIN, PACIFIC AND PACIFIC ISLAND REGIONS FROM FRANCE AND WEST GERMANY, 1989.

PURPOSE OF TRIP (%)	France						Germany								
	<u>US</u>	<u>WNC</u>	<u>MT</u>	<u>PA</u>	<u>PI</u>	<u>US</u>	<u>WNC</u>	<u>MT</u>	<u>PA</u>	<u>PI</u>	<u>US</u>	<u>WNC</u>	<u>MT</u>	<u>PA</u>	<u>PI</u>
Business	36	43	19	28	31	33	11	23	27	2	33	11	23	27	2
Convention	13	9	9	6	4	7	4	10	8	13	7	4	10	8	13
Vacation	43	35	73	60	59	49	57	70	63	98	49	57	70	63	98
Visit Friends	14	16	10	14	39	17	38	24	18	24	17	38	24	18	24
Visit Relatives	20	38	25	22	13	16	29	11	13	5	16	29	11	13	5
Study	6	22	14	10	11	4	6	6	5	13	4	6	6	5	13
LEISURE/RECREATIONAL ACTIVITIES (%)															
(*=less than one %)															
Shopping	75	71	76	71	79	84	91	86	85	82	84	91	86	85	82
Concert, play	21	11	20	20	24	22	54	27	26	24	22	54	27	26	24
Art gallery, museum	36	34	32	30	32	34	40	34	29	32	34	40	34	29	32
Sightseeing	64	77	85	81	74	69	90	86	84	88	69	90	86	84	88
Guided Tours	22	20	47	35	11	20	36	37	30	26	20	36	37	30	26
Nightclub	19	5	17	19	33	24	51	29	20	30	24	51	29	20	30
Camp, hike	6	13	14	10	2	11	35	32	24	16	11	35	32	24	16
Hunt, fish	2	6	1	1	1	7	27	6	3	6	7	27	6	3	6
Attend sports	8	8	6	8	6	11	43	12	12	17	11	43	12	12	17
Water sports	21	7	12	19	56	32	26	35	36	69	32	26	35	36	69
Winter sports	3	*	8	3	*	3	21	4	1	1	3	21	4	1	1
Tennis, golf	13	8	8	12	20	9	24	6	6	4	9	24	6	6	4
NIGHTS IN U.S. (No.)															
Mean nights	18	13	32	24	16	25	24	28	32	21	25	24	28	32	21
Median nights	9	13	14	13	14	15	16	23	22	16	15	16	23	22	16

TABLE 5. (continued)

	France				Germany					
	<u>US</u>	<u>WNC</u>	<u>MT</u>	<u>PA</u>	<u>PI</u>	<u>US</u>	<u>WNC</u>	<u>MT</u>	<u>PA</u>	<u>PI</u>
TRANSPORTATION IN U.S. (%)										
Airlines	45	72	54	50	72	44	55	66	66	93
Inter-city train	6	2	2	4	6	5	5	4	6	8
Inter-city bus	18	21	43	31	16	15	12	29	27	32
City bus or subway	23	27	27	25	25	21	14	32	30	33
Rented auto	45	75	51	54	79	50	27	66	61	77
Private auto	29	23	24	24	24	35	48	28	33	21
NUMBER OF STATES VISITED (No.)										
Mean states	2.0	2.9	3.3	2.5	2.2	2.1	3.4	3.4	2.9	2.2
Median states	2.0	3.0	3.0	2.0	2.0	2.0	4.0	3.0	3.0	2.0
MEAN EXPENDITURES IN U.S. (\$)										
Per party	1785	1412	2542	2616	3225	1925	2504	2796	2581	2442
Per visitor	1275	1009	1589	1635	2150	1375	1789	1864	1844	1354
Per visitor per day	71	76	51	68	134	55	75	66	59	65

Source: U.S. Department of Commerce, U.S. Travel and Tourism Administration

TABLE 6. PROFILE OF INTERNATIONAL VISITORS TO THE UNITED STATES AND THE WEST NORTH-CENTRAL, MOUNTAIN, PACIFIC AND PACIFIC ISLAND REGIONS FROM JAPAN AND THE UNITED KINGDOM, 1989.

PURPOSE OF TRIP (%)	Japan						United Kingdom								
	<u>US</u>	<u>WNC</u>	<u>MT</u>	<u>PA</u>	<u>PI</u>	<u>US</u>	<u>WNC</u>	<u>MT</u>	<u>PA</u>	<u>PI</u>	<u>US</u>	<u>WNC</u>	<u>MT</u>	<u>PA</u>	<u>PI</u>
Business	22	55	33	35	6	41	57	22	25	19	41	57	22	25	19
Convention	7	22	9	12	3	7	10	8	7	*	7	10	8	7	*
Vacation	66	13	55	44	91	49	39	76	67	81	16	15	16	19	27
Visit Friends	7	12	9	11	3	17	22	14	18	7	17	22	14	18	7
Visit Relatives	6	13	7	7	3	17	22	14	18	7	17	22	14	18	7
Study	8	19	13	15	3	2	1	3	3	*	2	1	3	3	*
LEISURE/RECREATIONAL ACTIVITIES (%)															
(*=less than one %)															
Shopping	90	85	93	88	94	85	89	81	86	88	85	89	81	86	88
Concert, play	13	14	29	17	8	17	17	19	18	25	17	17	19	18	25
Art gallery, museum	13	23	20	19	5	29	33	36	32	23	29	33	36	32	23
Sightseeing	79	67	85	79	86	74	73	88	89	87	74	73	88	89	87
Guided Tours	40	8	49	36	51	25	14	38	41	60	25	14	38	41	60
Nightclub	13	17	25	15	13	23	19	26	21	16	23	19	26	21	16
Camp, hike	3	6	6	4	2	9	19	18	15	4	9	19	18	15	4
Hunt, fish	2	4	2	2	1	3	6	2	1	3	3	6	2	1	3
Attend sports	6	3	6	3	8	13	12	16	15	8	13	12	16	15	8
Water sports	35	14	20	17	61	34	31	31	38	67	34	31	31	38	67
Winter sports	3	*	3	2	2	3	2	8	3	5	3	2	8	3	5
Tennis, golf	22	40	16	18	25	12	9	14	17	17	12	9	14	17	17

NIGHTS IN U.S. (No.)

Mean nights	12	20	19	15	7	19	22	29	26	18	19	22	29	26	18
Median nights	6	12	8	8	5	13	10	17	15	15	13	10	17	15	15

TABLE 6. (continued)

	Japan			United Kingdom						
	<u>US</u>	<u>WNC</u>	<u>MT</u>	<u>PA</u>	<u>PI</u>	<u>US</u>	<u>WNC</u>	<u>MT</u>	<u>PA</u>	<u>PI</u>
TRANSPORTATION IN U.S. (%)										
Airlines	52	85	87	69	42	47	59	65	59	85
Inter-city train	6	11	10	9	2	6	4	6	7	6
Inter-city bus	34	16	37	31	42	14	20	25	19	12
City bus or subway	24	13	25	25	25	24	23	30	34	57
Rented auto	29	46	39	34	25	42	42	56	54	56
Private auto	17	28	24	28	8	32	44	29	35	13
NUMBER OF STATES VISITED (No.)										
Mean states	1.6	3.1	3.1	2.2	1.2	2.0	3.0	3.1	2.6	2.4
Median states	1.0	3.0	3.0	2.0	1.0	2.0	3.0	3.0	2.0	2.0
MEAN EXPENDITURES IN U.S. (\$)										
Per party	2798	3742	2925	3022	2815	1599	1475	1848	1880	2051
Per visitor	1399	2339	1721	1679	1173	1066	1135	1155	1175	1207
Per visitor per day	118	118	90	109	181	55	53	40	46	67

Source: U.S. Department of Commerce, U.S. Travel and Tourism Administration

TABLE 7. PROFILE OF INTERNATIONAL VISITORS TO THE UNITED STATES AND THE WEST NORTH-CENTRAL, MOUNTAIN, PACIFIC AND PACIFIC ISLAND REGIONS FROM AUSTRALIA, 1989.

	Australia				
	<u>US</u>	<u>WNC</u>	<u>MT</u>	<u>PA</u>	<u>PI</u>
PURPOSE OF TRIP (%)					
Business	28	52	23	29	16
Convention	14	15	11	11	19
Vacation	61	46	75	68	79
Visit Friends	15	19	17	18	10
Visit Relatives	19	25	20	19	9
Study	2	1	3	2	1
LEISURE/RECREATIONAL ACTIVITIES (%)					
Shopping	89	86	90	90	94
Concert, play	22	20	28	26	18
Art gallery, museum	28	27	38	34	27
Sightseeing	77	79	85	82	90
Guided Tours	41	27	51	48	56
Nightclub	27	24	33	25	26
Camp, hike	9	18	19	11	6
Hunt, fish	3	13	2	3	1
Attend sports	14	17	22	15	10
Water sports	29	24	31	25	46
Winter sports	6	7	17	7	3
Tennis, golf	10	11	14	10	10
NIGHTS IN U.S. (No.)					
Mean nights	23	34	37	26	17
Median nights	13	20	22	17	12
TRANSPORTATION IN U.S. (%)					
Airlines	66	86	78	74	71
Inter-city train	8	3	10	11	5
Inter-city bus	21	15	34	26	24
City bus or subway	35	31	40	40	48
Rented Auto	42	53	46	43	43
Private Auto	30	43	35	31	14

TABLE 7. (continued)

	Australia				
	<u>US</u>	<u>WNC</u>	<u>MT</u>	<u>PA</u>	<u>PI</u>
NUMBER OF STATES VISITED (No.)					
Mean states	2.6	3.7	3.7	3.0	2.5
Median states	2.0	3.0	4.0	3.0	2.5
MEAN EXPENDITURES IN U.S. (\$)					
Per party	2628	3147	3940	3164	2945
Per visitor	1752	2248	2463	1978	1550
Per visitor per day	75	68	68	75	94

Source: U.S. Department of Commerce, U.S. Travel and Tourism Administration

between regions are evident. For example, Japanese tend to take guided tours and play golf or tennis more than the average. At the same time, there are major differences in the activities among Japanese visiting different regions of the West. Many Australians take guided tours but relatively low numbers play golf or tennis.

Generally speaking, overseas visitors to the West spend more nights in the United States. They also tend to visit more states than do those visiting other regions. Because of their longer visit to the U.S., visitors to the West from Australia, France, Germany, Japan and the United Kingdom spend more money in the nation. Although there are some exceptions, most of the West is a vacation destination for travelers from the principal overseas markets. Travelers from different countries of the world visit different regions and states for many different reasons.

The Relative Importance of International Markets

The relative importance of different international markets can be seen in the proportion of economic impact derived from visitors from the major markets (Table 8). Since visitors have grossly different expenditure patterns (For example, Canadians versus overseas travelers), the proportion of economic impact from a country does not necessarily reflect the number of visitors from that country. Nonetheless, the economic contributions provide a more level basis for comparing the relative importance of the different markets. As was noted earlier, Canada accounts for 42

TABLE 8. PROPORTION OF ECONOMIC IMPACT DERIVED FROM INTERNATIONAL VISITORS BY SELECT VISITOR MARKETS, WESTERN UNITED STATES.¹

State	United Kingdom		West Germany		France	Japan	Australia		Total ²
	Canada	Mexico	United Kingdom	West Germany			Australia	Australia	
ALASKA	22.9	*	9.4	3.3	*	51.5	4.0	91.1	
ARIZONA	17.8	36.3	7.0	3.3	2.2	9.0	2.8	78.4	
CALIFORNIA	5.3	9.6	7.7	3.0	3.2	25.8	4.6	59.2	
COLORADO	5.6	15.8	18.7	3.4	4.6	12.0	11.5	71.6	
HAWAII	9.3	1.5	4.2	2.7	0.5	60.2	7.8	86.2	
IDAHO	22.8	0.5	3.4	30.8	0.7	18.6	3.3	80.1	
KANSAS	3.7	5.3	8.1	10.9	1.6	28.2	2.9	60.7	
MINNESOTA	16.3	2.2	11.0	2.0	2.1	30.2	1.9	65.7	
MONTANA	29.2	3.6	4.3	5.8	1.3	20.3	1.8	66.3	
NEBRASKA	8.7	2.9	24.9	*	6.1	13.0	1.4	57.0	
NEVADA	20.2	7.6	6.9	3.6	3.3	17.1	3.6	62.3	
NO. DAKOTA	95.4	*	0.4	*	*	0.1	*	95.9	
OREGON	19.8	2.0	5.3	1.9	2.2	29.6	3.7	64.5	
SO. DAKOTA	86.2	*	1.8	0.5	0.7	4.3	0.8	94.3	
UTAH	7.2	6.4	9.9	10.9	15.9	12.8	2.8	65.9	
WASHINGTON	31.5	2.0	1.3	4.5	1.8	38.0	2.9	82.0	
WYOMING	21.4	*	6.4	0.8	10.5	6.4	8.6	54.1	

¹Source: U.S. Travel Data Center

²In most cases the remaining economic impact for each state is derived from a relatively large number of countries. However, in four or five of the states both Italy and Switzerland stand out as having significant impact (4% or less). In the case of Wyoming, a disproportionately large impact (17.7%) is derived from the Netherlands. Unfortunately, some of the major deviations may be anomalies in the data resulting from relatively small samples in base studies used to derive the estimates of economic impact.

* less than one-tenth of one percent (0.1).

percent of the international visitors but only 11 percent of the travel receipts.

In the West, the economic importance of the Canadian traveler is extremely variable among the states, ranging from 3.7 percent of the economic impact derived from international visitors in Kansas to 95.4 percent in North Dakota. On the other hand, Japanese travelers have very little impact on North Dakota, yet account for three-fifths of the international receipts in Hawaii.

However, in the final analysis, the West, like the rest of the nation, is dominated by the domestic traveler. Nonetheless, it is a very popular destination and will probably continue to experience increasing numbers of overseas visitors. As long as the U.S. dollar remains relatively weak against foreign currencies and the economies of other countries continue to strengthen, international visitors will comprise an increasing share of the tourist visiting the United States and the West.

ISSUES AFFECTING TOURISM IN THE WEST

Although it is possible to engage in various research strategies and examine vast, diversified data to aid in the development of policy and strategic responses to the growth of tourism in the West, an assessment of the tourism industry's perception of its needs and challenges is particularly enlightening. A needs assessment is a critical step in assessing the conditions which may partially circumscribe the situation under which organizational, policy, comprehensive, marketing or most any kind of planning is undertaken.

Obviously, input from industrial leaders may be self-serving and should constitute only one of many types of information and input vital to shaping policy for tourism development in the West. Nonetheless, such information is particularly insightful in determining the present and potential level of response that state and local government could take in dealing with an activity such as tourism. As tourism becomes a more predominate part of the economic, social and environmental structure of the West, new or

expanded programmatic responses will be required. Identifying individual roles and partnerships among the public and private sectors will be vital to assuring that tourism can be developed and managed to optimize its benefits while minimizing or mitigating its costs.

Over the past 15 years a series of tourism industry needs assessments have been conducted at various locations in the West. These assessments were not done as part of a central or coordinated project but were conducted at different times and places as a part of various state or local projects. Consequently, they do not cover all of the states in the West nor are they necessarily representative of all the challenges and issues facing the region's tourism industry. On the other hand, these assessments were all conducted utilizing the same methodology and may represent a reasonable sample of the region's industry. Granted, each community within the West undoubtedly has unique challenges and opportunities; however, experience suggests that there are some very common and basic ones which thread through the tourism industry in the West, as well as the entire nation. It is these issues which deserve attention in crafting model policy that will serve as a foundation for initiatives in tourism development which successfully integrate it into the West's future.

In total, eleven needs assessment workshops conducted over a period from May 1987 to November 1990 are summarized. They involved participation from approximately 600 western tourism, planning, community, government and business leaders as well as

legislators and other elected officials. These people worked in 23 small subgroups to generate and prioritize, through a modified nominal group process, hundreds of issues, challenges or problems perceived to be impacting tourism in the West and its states and various regions. In many cases, the participants also identified the impacts of tourism on the environment and local communities.

In addition to the workshops summarized here, at least 18 similar workshops comprising about 30 subgroups of 600 or 700 people were held in Arizona, California (including representatives from the Pacific states and territories), Colorado, Idaho, North Dakota, South Dakota, Washington and Wyoming in the past. Unfortunately, documentation of these workshops is not readily available. However, other than some very localized and unique challenges, the issues identified in these additional workshops were very similar to the information reported here.

Ironically, except for special local problems, the issues confronting tourism development in the United States are pervasive and similar dating back to the mid-1970's when national and regional assessments were conducted as part of the National Tourism Policy Study (The Study led to the creation of the National Tourism Policy Act, signed into law by President Reagan in October of 1981). The only thing unique about the seven national and six multi-state regional assessment workshops conducted in 1976 and 1977 was the sensitivity of the industry to energy issues brought on by the Arab oil embargo. In addition, since these workshops

were designed to gain information for a "national" tourism policy; some of the input was directed to issues dealing with the federal role in tourism. The very extensive lists of needs and issues generated in this process can be found in National Tourism Policy Study Ascertainment Phase: Report of the Ascertained Needs of the State and Local Governments and Private Sectors of the Tourism and Travel Industry, Committee Print, Committee on Commerce, Science, and Transportation, United States Senate, U.S. Government Printing Office, Washington: 1977. The workshops held in Denver and San Francisco provide particularly enlightening information on tourism in the West. In the final analysis a set of specific issues associated with the tourism industry were distilled from all workshops held in 1976 and 1977. They included the following:

Specific Issues for the Consuming Public

1. Inadequate development of tourism attractions, opportunities, services and facilities for meeting the needs of the consuming public.
2. Inadequate or potentially inadequate quality of services in the tourism and travel field for meeting the increasingly sophisticated demands of the public.
3. Inadequate surface and air transportation facilities and services.
4. Concentration of public demand on certain popular tourism regions, sites, and attractions resulting in overcrowding and diminishment of the individual tourism experience.
5. Inadequate provision of information to consumers on the wide range of available travel and tourism opportunities, facilities, and services, and of the means for taking advantage of them.
6. Inadequate provision of information to potential foreign visitors of travel opportunities in the United States.

7. Inadequate understanding of the consuming public's specific tourism and travel needs, desires, and motivations due to inadequate research.
8. A failure to meet the public's tourism and travel needs and demands due to inadequate planning for tourism development.
9. Inadequate consumer protection for the touring or traveling public.
10. Inadequate development of facilities and services for foreign visitors to the United States.
11. Inadequate tourism opportunities and services for the economically disadvantaged, minorities, the aged, and the physically handicapped.

Specific Issues for the Private Sector

1. Fragmented nature of the tourism and travel industry in a period of growing interdependence among segments of the industry.
2. Declining availability of capital and high development and operating costs in the tourism and travel industry.
3. The negative effects of seasonality cycles on the tourism and travel industry.
4. Rising costs and declining availability of energy in general and gasoline in particular.
5. Popular opposition to further development of tourism facilities and services in some areas.
6. Conflict between the need for tourism development and the need to protect the environment.
7. Competition between public and private sector development on public lands or lands adjacent to public lands.
8. Difficulties of survival for small businesses in the tourism and travel industry.
9. Inadequate promotion of specific tourism attractions, sites, facilities, or services.
10. Inadequate promotion overseas of travel opportunities in the United States.

11. Inadequate planning for both site-specific and regional tourism development to maximize profitability for both the individual entrepreneur or firm and for the industry as a whole.
12. Inadequate promotion among foreign organizations of potential opportunities for holding international conventions, fairs, and meetings in the United States.
13. Inadequate numbers of skilled, professional personnel in the tourism and travel industry.

Specific Issues for the State and Local Public Sectors

1. Inadequate promotion of job opportunities in the tourism and travel industry.
2. Inadequate training and education of skilled, semiskilled, and unskilled working personnel for the tourism and travel industry.
3. Inadequate planning for multi-county and statewide tourism development to maximize profitability, meet the tourism needs of the consuming public, and integrate tourism with other social, industrial, and environmental needs.
4. Inadequate research for planning, market development, program evaluation, and industrial trend evaluation.
5. Inadequate formulas and mechanisms for allocating and distributing financial and technical assistance in ways which will maximize the beneficial impacts of such assistance.

A comparison of the results of the needs assessment workshops held more recently in the West yield some interesting similarities to the information reported above which was collected 11 to 14 years earlier. The eleven workshops reported below were held in the following locations around the West:

1. Governor's Tourism Rural Task Force Industry Leader Needs Assessment Workshop, Leadville, CO, May 8, 1987 (two subgroups)
2. Governor's Tourism Rural Task Force Industry Leader Needs Assessment Workshop, Monte Vista, CO, May 10, 1987 (two subgroups)
3. Governor's Tourism Rural Task Force Industry Leader Needs Assessment Workshop, Las Animas, CO, May 12, 1987 (two subgroups)
4. Governor's Tourism Rural Task Force Industry Leader Needs Assessment Workshop, Grand Junction, CO, May 15, 1987 (two subgroups)
5. Arizona Office of Tourism Industry Leader Needs Assessment Workshops, Phoenix, AZ, March 27 and 28, 1989 (four subgroups)
6. Utah Governor's Conference on Recreation and Tourism, Cedar City, UT, April 18 and 19, 1989 (two subgroups)
7. Nebraska Office of Tourism Industry Leader Needs Assessment Workshop, Kearney, NE, September 21, 1989 (two subgroups)
8. Idaho Division of Travel Promotion Industry Leader Needs Assessment Workshop, Moscow, ID, October 24, 1990 (two subgroups)
9. Idaho Division of Travel Promotion Industry Leader Needs Assessment Workshop, Boise, ID, October 25, 1990 (two subgroups)

10. Idaho Division of Travel Promotion Industry Leader Needs Assessment Workshop, Pocatello, ID, October 26, 1990 (one group)
11. City of Flagstaff Tourism Department Industry Leader Needs Assessment Workshop, Flagstaff, AZ, November 9, 1990 (two subgroups)

In each workshop the participants ranked all issues in order of priority or importance. For purposes of this analysis, the 15 most important issues in each workshop subgroup were grouped into general categories which seemed to identify a common or closely related bundle of issues. Table 9 identifies the largest or most frequently mentioned issue groups. They are generally ranked in order of importance. Importance or priority ranking is based on the number of workshops and subgroups in which an issue was mentioned and the total number of times it was identified among the top 15 issues in each workshop subgroup.

These issues are important for identifying policy ingredients and programmatic responses needed to meet the goals of tourism development. In cases where some regional or state coordination leadership is required, a response to these issues must eventually come from state government, a sanctioned inter-state regional organization or state and regional associations of the tourism industry. While the role of government in tourism may be open for debate, the fragmented nature or compartmentalization of the tourism industry coupled with its pervasiveness and potential to generate broad personal and community social, economic and

Table 9. (continued)

<u>Rank</u>	<u>Issue</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>	<u>8</u>	<u>9</u>	<u>10</u>	<u>11</u>
8.	Lack of research and data/information for marketing, planning, development, management.	x	x	x	x	x	x	x	x	x	x	(13,19)
9.	Poor/inadequate image of states, regions, communities as destinations.	x	x	x	x	x	x	x	x	x	x	(13,16)
10.	Inadequate public transportation. Poor roads and highways.	x	x	x	x	x	x	x	x	x	x	(11,16)
11.	Lack of state, regional, local leadership.	x	x	x	x	x	x	x	x	x	x	(12,14)
12.	Conflict between tourism and environmental and social interests. Lack of understanding of positive and negative relationships.											(5,7)

Workshop locations: 1. Leadville, CO; 2. Monte Vista, CO; 3. Las Animas, CO; 4. Grand Junction, CO; 5. Phoenix, AZ; 6. Cedar City, UT; 7. Kearney, NE; 8. Moscow, ID; 9. Boise, ID; 10. Pocatello, ID; and 11. Flagstaff, AZ.

Numbers in parentheses represent subgroups in which an issue was identified and the total number of times an issue was ranked among the top 15 issues in workshop subgroups.

Source: HUNT & HUNT, Troy, Idaho. The information from all workshops represents secondary data gathered in the individual states listed. These workshops were conducted with resources from these states for purposes other than use in this paper.

environmental benefits or costs requires an holistic, public response. The federal government has not assumed leadership. Industry remains fragmented and has not been able to coalesce in such a fashion that it can have a major influence on the development and control of tourism. It would appear that if tourism is to be of personal, economic or environmental benefit to people who travel and the people, organizations and places with whom they come in contact, the states must become the pivotal players in tourism destination planning, development, marketing and management.

The issues identified in Table 9 can be elaborated as follows:

Issue #1: The fact or perception that there is a lack of understanding of tourism and its value and impacts appears to be both an important and universal issue of concern among tourism industry leaders in the West. Even though tourism is the third largest industry in the United States and the top employer in many of the western states, it is not always regarded as economically significant and its jobs are regarded as low paying and substandard. Very little recognition is given to the human or personal benefits of travel and the fact that tourism may promote the preservation and revitalization of unique or nearly lost natural, cultural and historical characteristics of communities and other

places. There is a general belief that not enough is done to educate the public, government, industry, and political and community leaders about tourism's contribution to economic development and historical and cultural preservation, as well as its positive and negative impacts upon social, natural and community environments. There is a concern that many community residents and political leaders hold poor or ambivalent attitudes, and in some cases, hostility, toward tourism and tourists. In some cases, it is believed that there is a fear of and resistance to change among local residents; and tourism is perceived to be the cause or agent of that change rather than the result of national and global demographic and economic changes. Some prefer to lock out tourism, rather than managing it as a means of diversifying community economies which are softening or deteriorating as the result of changes in traditional industries. Others see tourists as competing for recreational opportunities, causing land values and service prices to increase, and degrading social and environmental quality.

Issue #2 There is a decided lack of cooperation and communications within the tourism industry. It

lacks cohesiveness. Its lack of unification is seen as an hinderance to its growth and prosperity. The compartmentalized nature of the activity of tourism appears to contribute to a type of "fragmentation" which is perceived to keep tourism from gaining a solid and well-established role in the economic and social fiber of many states and communities. It is felt that many segments within the industry do not understand their interrelatedness nor how the industry can integrate with and contribute to other industries and community values.

Issue #3 There is a general belief that tourism industry service employees lack adequate knowledge and training about the tourism/hospitality industry, the needs and characteristics of visitors and the nature and extent of the local and regional tourist product. Industry leaders clearly believe that there is a lack of hospitality training programs to respond to this deficiency. In addition, there appears to be a perceived lack of professional and industrial education and training programs which maintain a ready supply of career-entry to mid-level management human resources. There is a lack of technical assistance and continuing education programs to assist community leaders and small

business operators cope with the opportunities, changes and impacts of tourism. It is believed that there is a lack of tourism planning, development, marketing and management expertise in many areas of the West.

Issue #4 There is a general lack of state, regional and community comprehensive tourism marketing, development and management planning and policy. Where tourism is concerned, emphasis in the public sector has been on promotion, with little attention devoted to leadership in planning which would bring cohesion and direction to the industry. No one appears to be picking up the role of state, region-wide or community planning and policy development which will integrate tourism with other economic, social and environmental needs of states and communities. Tourism is often treated as frivolous and something that "just happens," without treating it as a major social and economic activity which requires long-term strategies for its development and management and considers a broad range of issues from marketing to capacity management.

Issue #5 There is a general belief among leaders of the tourism industry that the region and its communities

have relatively poor and inadequate highway information and direction signing. The quality and availability of in-destination visitor information systems are highly variable.

Issue #6 There is particularly high concern that the existing public facilities and infrastructure are not adequate to handle the increasing demands of both tourists and residents. There is a general lack of funding and absence of creative financing to support touristic facilities and infrastructure. States are not devoting adequate attention to encouraging or stimulating product development and support services that will serve the needs of the tourist. Emphasis of state and other public sector tourism programs is unbalanced with a bias to promotion and sales and little or no attention given to ways to encourage and refine product development and delivery.

Issue #7 Funding for state and local tourism marketing and promotion programs is limited. The problem is particularly acute at the regional and local levels. Dedicated, broad-based tourism taxes or other forms of state or local funding which can support tourism marketing and development (planning and management) are lacking.

Issue #8 There appears to be a general lack of research data and information critical to tourism planning, development, marketing and management. The data that are available are not centralized or easily accessible. There is not adequate research on markets and their characteristics, product inventories, economic and employment impacts, image assessments, attitude and satisfaction levels, social and environmental impacts, carrying capacities, resident attitudes, etc. for developing sophisticated tourism development, marketing and management strategies.

Issue #9 It is the impression of many in the western tourism industry that their states, regions and communities lack strong or well defined images. Some believe their images lack focus or are unclear and not conducive to becoming travel destinations. Some industry leaders believe their communities or states lack a unifying thread which creates a strong visual and perceptual identity. Some residents appear to lack community or state pride. Some individuals, particularly in some rural areas, seem inflicted with a hopelessness and lack the pride and

enthusiasm necessary to create an hospitable environment.

Issue #10 It is believed that there is generally poor public transportation within much of the western United States. With the exception of access to an from the major metropolitan areas, most of the region lacks good public or mass transportation. The lack of public transportation, particularly in rural areas, is seen as a deterrent to a healthy and well-developed tourism industry. Much of the region is automobile-dependent; yet highway access, particularly north and south, is limited or poorly maintained. Even though significantly high levels of passenger miles are generated by leisure travelers, much of the highway design and support services accommodate commuting and the movement of commerce rather than touring and related travel.

Issue #11 Some representatives of the tourism industry and others believe there is a lack of local and state leadership to guide and coordinate tourism development and its integration with local and state economic and social development. State leadership sometimes seems unresponsive to the needs of local communities and tourism initiatives. Leadership

does not seem to be responding to the challenges and opportunities presented by tourism. In other cases, state programs appear to be highly politicized or are oriented to other priorities which do not seem to address local needs.

Issue #12 There is thought to be real and potential conflict between tourism development and environmental and social interests. There is distorted or inadequate understanding of the positive and negative relationships between tourism and the environment. The balance between environment and economic development is unclear. Some tourism development lacks the kind of planning and management which will enhance its positive or mitigate and reduce its negative environmental and social impacts. Issues of capacity and how to control both tourism and general growth are of concern to growing numbers of tourism and community leaders. Sharing or distributing social, environmental and infrastructural costs is a challenge.

These issues are not all-encompassing of the issues and challenges facing states and communities in the West. Nonetheless, they represent a relatively broad and interesting array of issues important to both tourism industry and other community leaders and

citizens. While it is probably neither appropriate nor possible for states to respond to all of these issues, their near universality throughout the West and the nation requires that they be given serious consideration in public and private sector programs. Frankly, the states will probably have to take an increasingly strong leadership role in addressing these issues. As these issue may relate to the activity of tourism, both from the point-of-view of the local and non-resident who travels within the West and the industry and communities which responds to their needs, the programs of state tourism offices must be broadened and articulated with other programs of the public and private sectors to respond to the challenges and opportunities they present.

**AN ANALYSIS OF WESTERN STATES TOURISM POLICY
AND PROGRAM ORIENTATION**

Existing State Tourism Policies and Programs Are Narrow

A familiarity with most western state tourism programs and review of existing policies, codes and executive orders indicates that state tourism policies are either non-existent or relatively narrow in scope. Likewise, programs have traditionally been restricted primarily to activities related to the promotion of states and distribution of information to the traveling public and travel trade. In the past, some state tourism programs were referred to as publicity bureaus. In some cases, even present day state tourism office names reflect a long-time bias or orientation toward promotion and publicity (i.e., Idaho Division of Travel Promotion, Montana Promotion Division, North Dakota Tourism Promotion, and Pennsylvania Travel Marketing Bureau). There are a couple of cases where a state has adopted a relatively broad and meaningful policy but programmatic responses, at least within the office of tourism, remain narrow or limited in scope.

Data provided annually by the states to the U.S. Travel Data Center reveals that most of the nearly \$360 million spent by the states in fiscal year 1990-91 went to promotion and information programs. In fact, in the Data Center's Survey of State Travel Offices 1990-91 there are no budget categories which would clearly identify activities or programs other than those which are oriented to promotion, marketing or information distribution. In 1990-91,

the portion of total budgets allocated for advertising in the form of media purchase and production costs accounted for 34 percent. However, almost all other categories related to promotion, sales or information distribution, including such items as printing and production, inquiry fulfillment, press and public relations, domestic sales promotion, international advertising and promotion, and welcome center operations. While state supported research and matching grant programs may have been devoted to such things as long-range planning or hospitality training programs, it is safe to assume that the majority of these funds were also spent on promotion and advertising related activities.

Table 10 represents the percent of time and budget distributed between programs in 1) tourism marketing and promotion, 2) development of social and physical infrastructure, and 3) long-range planning and management of the tourism industry as reported by the western state and territorial tourism offices in a survey conducted by the Western Governors' Association early in 1991. Clearly the emphasis is on promotion. The effort in promotion among the offices of tourism ranged from a low in American Samoa of 35.5 percent to 100.0 percent in California and Wyoming. However, the percent distribution among those reporting was skewed to the upper end with a median of 80 percent and an average of over 77 percent. A casual familiarity with many of the state offices of tourism would lead one to believe that although some are broadening their programs, a few of the cases reported here may represent a misinterpretation of the question or an exaggeration

of involvement in long-range planning and management of the tourism industry.

TABLE 10. PERCENT OF WESTERN STATE TOURISM OFFICE TIME AND BUDGET IN PROMOTION, DEVELOPMENT AND MANAGEMENT/PLANNING.

<u>State</u>	<u>Promotion</u>	<u>Development</u>	<u>Management/Planning</u>
ALASKA	85.0	10.0	5.0
AMERICAN SAMOA	35.5	13.8	50.7
ARIZONA	NA	NA	NA
CALIFORNIA	100.0	0.0	0.0
COLORADO	91.5	0.0	8.5
GUAM	60.0	15.0	25.0
HAWAII	50.0	0.0	50.0
IDAHO	80.0	5.0	15.0
KANSAS	70.0	0.0	30.0
MINNESOTA	NA	NA	NA
MONTANA	94.0	1.5	4.5
NEBRASKA	65.0	0.0	35.0
NEVADA	90.0	5.0	5.0
NEW MEXICO	70.0	20.0	10.0
NORTH DAKOTA	90.0	5.0	5.0
N. MARIANNA ISL.	NA	NA	NA
OREGON	NA	NA	NA
SOUTH DAKOTA	70.0	10.0	20.0
UTAH	86.0	5.0	9.0
WASHINGTON	77.0	11.5	11.5
WYOMING	<u>100.0</u>	<u>0.0</u>	<u>0.0</u>
AVERAGE	77.3	6.0	16.7

Source: Response by states to survey conducted by Western Governors' Association visiting scholars and staff.

States Need to Adopt Broader Tourism Policies and Programs

There are many trends, conditions and issues created by tourism that suggest the need for states to adopt broader, more meaningful tourism policies. At the same time, they should consider expanding programmatic responses or implementation of policy to optimize the significant social and economic

opportunities and benefits while minimizing or mitigating various social, environmental and other costs of tourism. All trends indicate that the opportunities and challenges of tourism will intensify in the years to come. This would seem to be particularly true in the Western United States where changes in the economy and industrial foundations have only begun to occur in the past decade. As the past, singular reliance on extractive natural resource industries or agriculture gives way to or is supplemented by new industries, among them tourism, the community and industrial impacts and conflicts will intensify. Change alone will create a variety of challenges.

Rural Areas Have Lower Tourism Carrying Capacity

Where tourism is concerned, there is presented a variety of challenges that are particularly unique to the West or areas characterized by small rural communities. While urban and suburban regions have the capacity to absorb relatively large volumes of tourists and the products and services of the tourism industry, rural or small communities have lower carrying capacities. That is, as pointed out in the discussion on the relative importance of tourism receipts, not only are the benefits more intensified in rural or small states and communities but the costs can also be relatively more significant.

Benefits and Costs of Tourism Are Pervasive

At the same time, the benefits and costs of tourism are very pervasive, cutting across the social, environmental and economic fabric of communities, impacting individuals, businesses, and government. Few people can escape its touch. The perception that tourism is an economic activity which benefits a just few private sector businesses represents an extremely narrow and dangerous understanding of the nature and value of tourism. Tourism is an activity of human experiences of great value and importance to those who travel. It brings economic activity and provides jobs. Tax receipts provide the funding for community and other government services. Historical and environmental preservation may be stimulated by tourist interest. Likewise, there can be a variety of community, social, cultural, economic and environmental costs. Conflict over land uses may result. However, the pervasiveness and magnitude of these benefits or costs is particularly keen in rural communities. In this regard, the Western United States probably has more to gain or, conversely, more to lose from tourism than any other region of the United States.

States Appear Poised to Assume Leadership Role in Tourism

Finally, it would appear that the opportunity and need for states to assume the leadership role are great. Neither government at other levels nor the tourism private sector have stepped forward to lead and coordinate tourism in a way that will assure that it provides optimal benefits to society over the long run. While

local individuals and communities must play a pro-active role in tourism development and management, they generally lack the expertise and resources to harness and guide tourism in ways most beneficial to them and their areas.

While some federal agencies such as the Bureau of Land Management, National Park Service and U.S. Forest Service have begun to show increasing interest in tourism, the federal government has never been able to rally its forces to give national leadership in tourism. Although the nation adopted a National Tourism Policy in 1981, it has never implemented it with broad-based, meaningful programs. Instead, it, like the states, has placed its major tourism effort on promotion with emphasis on trying to attract international visitors to the United States. Granted, there are many federal programs which contribute to the nature and conditions of tourism in the country. However, very little has been offered which addresses the majority of issues characterizing tourism in the country or have helped individuals, communities and businesses to cope with opportunities and challenges which are increasingly presented by tourism.

All of this leads to the conclusion that states, in partnership with the private sector, federal government and communities, have the opportunity to fill the leadership void which exists in tourism. Once again, since no others have done so and the cost and benefits appear so great, it is clearly in the best interests of the states to rise to this challenge. However, if they are to meet this challenge in a positive way they must

carefully examine and, where necessary, change and expand state tourism policies and their programmatic implementation.

A MODEL TOURISM POLICY FOR WESTERN STATES

It is very clear that any state tourism policy must reflect the unique qualities, values and needs of a state and its citizens. No two state tourism policies should necessarily be the same. Nonetheless, there are models which respect the basic goals of tourism development as outlined earlier. At a minimum these goals should be embodied in all state tourism policies. To recap, they deal with 1) providing quality and authentic experiences for the tourist (visitor and resident), 2) providing the opportunity for businesses and government to make a profit--socially, economically and politically, 3) protecting and wisely using the natural, historical and cultural resources, and 4) integrating the values and needs of the state/community resident.

The following represents a policy suitable for adoption by most states in the West. It is in the best interest of the citizens of each state to develop a state tourism policy to:

--optimize the contributions of tourism to economic prosperity and full employment of (state);

--make the opportunity for tourism in (state), universally accessible to all and to insure that present and future generations are afforded adequate tourism and recreation resources;

--contribute to personal growth, health, education, and intercultural appreciation of the geography, history, and ethnicity of (state);

--encourage the entry of individuals traveling to and from (state), in order to enhance understanding and goodwill, consistent with immigration laws, the laws protecting the public health, and laws governing the import and export of goods and services;

--promote quality, integrity, authenticity, and reliability in all tourism and tourism-related services offered to visitors to (state);

--preserve the historical and cultural foundations of (state) as a part of community life and development, and insure future generations an opportunity to appreciate and enjoy its rich heritage;

--insure the compatibility of tourism with other state and community interests;

--assist in the collection, analysis, and dissemination of data that accurately measure the economic, social and environmental impact of tourism to and within (state) in order to facilitate planning and management in the public and private sectors; and

--harmonize, to the maximum extent possible, all governmental activities in support of tourism with the needs of the general public and (state), local

governments, and the tourism industry, and to give leadership to all concerned with tourism in (state).

RECOMMENDATION I: It is recommended that all western states adopt broad-based tourism policies which embrace the basic goals of tourism development.

Expanded State Tourism Programs

It is likely that implementation of state tourism policies could result in a variety of programmatic responses. Obviously, like the policy, programs should respect the unique characteristics of each state and its various tourist markets. However, there are a variety of issues that are pervasive with tourism throughout the nation and the West and deserve attention from all states. Above all, existing state programs appear imbalanced in favor of promotion. Generally speaking, they do not appear to be addressing the opportunities and challenges tourism presents to the states.

In order to respond to these needs, assume leadership and assure tourism meets the basic ingredients of a comprehensive tourism policy, state programs should be expanded or reoriented to enhance the existing activities in promotion and marketing. In so doing, they should include aspects of on-going comprehensive planning, capacity management, product and human resource development, research, public and visitor education, and coordination.

Comprehensive Tourism Planning. While an increasing number of states are beginning to develop tourism plans there is the need for many of them to broaden the scope of their plans to be comprehensive in nature. Many need to make the next step beyond "marketing planning," and begin to incorporate issues of resource and product development, management, roles and a host of other activities. At the same time, other states need to initiate a state-wide tourism planning process. These plans need to be dynamic with the goal of positioning tourism as a vital ingredient of each state's social, economic, political and environmental character. Planning is needed to develop a more long-term approach to tourism development, marketing and management.

RECOMMENDATION II: It is recommended that western states adopt dynamic state-wide comprehensive tourism planning processes.

Capacity Management. The issue of management and capacity management is a new one for most state tourism programs. It also has the potential of being relatively controversial and difficult to implement. Unfortunately, capacity management has some of the ingredients of regulation which are so feared and usually resisted by the private sector. Nonetheless, state tourism offices must take the lead in helping communities and others to identify levels of social and environmental capacity of tourism and initiating strategies to assure that such capacities are not exceeded. Such

an approach does require more management of people and resources and, may even eventually require regulation and control.

In many cases, capacity management strategies may just involve the promotion of lesser used or known areas or reducing promotion of excessively or heavily used areas, teaching tourists to be more respectful of local values and environments or presenting visitors with alternative routes or locations for travel. At other times, capacity management may require setting quotas on certain attractions and events, raising fees, requiring special use permits and other more restrictive strategies to maintain tourist use within the capacity of the attraction or community.

RECOMMENDATION III: It is recommended that states develop capacity management strategies which will assure that negative impacts of tourism are reduced, minimized or mitigated.

Tourism Development. Most states own and operate tourist attractions such as parks, museums, visitor centers, rest areas, theaters, fishing and hunting areas, and other products vital to tourism. There are a few cases in which states own and operate resorts, convention centers and other products normally found in the private sector. While it is probably not appropriate for state tourism offices to develop, own and operate physical facilities beyond visitor centers, it seems reasonable to expect states to assist communities and businesses in tourism development. For

example, helping communities to assess their resources and tourism potential is a type of tourism development which could fit within the purview of state offices of tourism. Likewise, programs designed to bring developers together with development needs and opportunities would be helpful. Loans and other financial assistance may be administered within a state's tourism program. Essentially, states have an opportunity to provide, beyond highways, parks and other traditional products vital to tourism, guidance and assistance to communities and businesses which will assure the development of a quality tourism product. Issues of transportation are vital to tourism development in the West. State tourism offices need to take a more active role in addressing these and related issues.

At the same time, human resource development will become increasingly important to the vitality of tourism. States can play a role in developing training programs, working with schools, and assisting others in human resource development. Developing strategies for affordable housing will be increasingly important in resort areas or communities heavily impacted by tourism.

RECOMMENDATION IV: It is recommended that western state tourism offices take a more active role in tourism human and product development.

Research. Research has never been so critically needed. Not only must states continue to measure the economic impact of tourism

but they must begin to invest more of their resource into understanding and measuring the social and environmental impacts of tourism. Developing local alternatives to conventional tourism development often needs expert investigation.

Likewise, a better understanding of tourist needs and characteristics is vital for both marketing and management. In essence, research needs to become an on-going mainstay of state tourism programs. It must be expanded to touch on a broader spectrum of issues than has been studied in the past.

RECOMMENDATION V: It is recommended that western states expand their research activities to embrace a more extensive and broader array of research.

Education. Public education of both residents and visitors is vital to insure that tourism is incorporated into communities with the greatest return on human and economic investment. Residents need to better understand how tourism works within their communities and what it can and cannot do for them. Many communities need assistance in coping with change. They need to learn how to be better hosts. On the other hand, visitors can be taught to be better guests. Better hosts and better guests leads to less conflict and negative impacts of tourism. Well educated residents and tourists can go a long ways toward optimizing the positive benefits of tourism.

RECOMMENDATION VI: It is recommended that western states expand their activities in tourism education at all levels.

Coordination. Coordination and communications within the tourism industry is an issue of paramount importance in almost all states. In most cases, the compartmental nature of the private sector of the tourism industry impedes communications and coordination. The industry is often characterized as "fragmented" and lacking in cohesion. While some states have successful industry associations which attempt to coordinate the industry, generally state tourism offices have the potential to fulfill such a role.

In addition, there is a great need for coordination and communication within state government and among local, state, and national governmental programs and agencies. State tourism offices could serve to bring governmental entities together on issues vital to implementing state tourism policy. Duplication or conflict within government programs impacting tourism needs to be identified and reduced. Resources can be pooled to more efficiently achieve the goals of several agencies.

RECOMMENDATION: VII: It is recommended that western state tourism offices take more aggressive leadership in coordinating and linking

the many components of the tourism
industry.

A FINAL WORD

In the final analysis, where tourism is concerned the Western states appear poised at a crossroads. They can take the narrow path of tourism promotion or the wider road of integrated tourism planning, development, marketing and management. It is this latter road that will lead to the highest social, economic and environmental return on investment from tourism. It is the high road that will help the states and their communities to optimize the best tourism has to offer the western states, those who are fortunate to live there, and others in the nation and world who may be fortunate to visit there in the future.