

Destination and enterprise management for a tourism future

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ABSTRACT

A key element of a successful tourism industry is the ability to recognise and deal with change across a wide range of key factors and the way they interact. Key drivers of global change within the external environment can be classified as Economic, Political, Environmental, Technological, Demographic and Social. Based on a series of workshops comprising a range of Australian tourism stakeholders this paper explores the way in which these key drivers could affect the global tourism industry to the year 2020. An exploration of these trends allows important change agents, on both the supply side and the demand side of tourism, to be highlighted and discussed. In response, innovative strategies can be formulated by destination managers and tourism operators to avoid strategic drift for their organizations and to develop tourism in a sustainable way.

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1. Introduction

Achieving competitive advantage in times of rapid change requires tourism stakeholders to have a clear understanding of the direction of change and its implications for business or destination management. Since tourism is essentially integrated with other sectors in the economy, tourism trends cannot be considered in isolation from key drivers that will shape the world of the future.

There is increasing competition in the tourism and hospitality industries – between destinations worldwide (between established markets and from new markets), between destinations domestically, and between firms within a destination. The greater our knowledge of the trends underpinning tourism development the greater the capacity of destination managers and tourism operators to formulate strategies to achieve competitive advantage for their organizations.

The coming decade and a half will see major shifts in the leisure and tourism environment reflecting changing consumer values, political forces, environmental changes and the explosive growth of information and communication technology. Those destinations

and individual operators that make decisions on the supply side that do not match changing customer needs will suffer the phenomenon of ‘strategic drift’ (Johnson & Scholes, 1997). Strategic drift occurs when an organization’s strategy gradually moves away from addressing the forces in the external environment with no clear direction.

This paper argues that in a world in which the broad global trends can be identified to some extent, their influences on tourists, destinations and tourism organizations (public and private) can be established. The challenge for tourism stakeholders in both private and public sectors is to account for these changes proactively to achieve and maintain competitive advantage for their organizations. In these circumstances, research can play a major role in assisting strategy formulation by suppliers of the tourism product – the tourism destination and enterprise. Tourism stakeholders can strategically act as ‘future makers’ rather than ‘future takers’ (Ell-yard, 2006). This requires tourism stakeholders to ask, not ‘what will the future be’, but rather ‘what *should* the future be’ and ‘how can we meet that future?’

The paper first identifies the major forces driving global change to 2020 which appear in the general ‘futures’ literature. Second, the paper will, based on the views of industry participants in the workshops, explore the ways in which these trends influence tourist values and attitudes, and the management of tourism destinations and tourism enterprises including new product and service development. Third, the paper discusses how innovative strategies can be formulated by destination managers and tourism

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operators worldwide to avoid strategic drift for their organizations and to develop tourism in a sustainable way. While the workshop discussion undoubtedly at times had an 'Australian focus' much of the industry input was relevant to tourism industries worldwide. Consequently, the implications of the global trends for new product development and various aspects of enterprise and destination management are of generic interest.

2. Methodology

A trend is 'a general direction or tendency'. The term trend is often found in the analysis of graphical data where a 'trend' line (often derived from regression analysis) may be used to extrapolate from existing information to some future point. Such extrapolation is valid if the function that relates the variables together remains unchanged during the future period that is being extrapolated. This is a complex way of saying that trends are predictive of the future so long as nothing important changes. The problem of course is that in tourism many relevant factors that affect supply and demand are constantly changing and thus one of the purposes of trend analysis is to identify key factors that influence tourism supply and demand. In some situations, the general tendency for change in the external factors is overwhelming: there may be pervasive and global forces at work that are affecting society as a whole and these trends are generally called megatrends. We take a megatrend to involve some consistent pattern in the adoption of new behaviour by large numbers of people.

PEST analysis is a well known strategic management tool to categorize different forces of change and trends on a general level, decomposing the macro environment into four segments – Political, Economic, Social, and Technological. (Fahey & Narayanan, 1986) Subsequently, environmental and demographic segments were added, completing the model. The STEEP model (Evans, Campbell, & Stonehouse, 2003) emphasises that the macro environment is a system of interrelated parts that affect one another. This framework is useful in identifying and structuring some of the more important drivers of change that will influence tomorrow's tourism and travel trends. Political, Economic, Social, Technological, Demographic and Environmental drivers are the changing realities that make up the strategic context within which long-term tourism industry policies, planning and development are made. These drivers also influence the external environment in which consumers make travel related decisions, such as where to go, how to go, what to do and how much to spend.

Within this context the first stage of the study undertook an examination of the extensive published literature on tourism forecasts to 2020. Indicative literature includes European Travel Commission (2004), Nordin (2005), United Nations (2005), United Nations World Tourism Organization (2002), and Viner and Nicholls (2005). In drawing upon this literature, the authors were able to identify global trends which could have significant implications for Australian tourism at least to the year 2020. The literature review also includes a discussion of global trends proposed by futurists (Glenn & Gordon, 2000; Goldblatt, Perraton, Held, McGrew, & Anthony, 2006; Hammond, 1998; National Intelligence Council (NIC), 1999, 2004). These forecasts provided a basis for investigating in more detail the influences that wider trends have on tourism flows globally over the next 15 years. In examining these drivers, several points should be kept in mind:

- No single driver or trend will dominate the global future in 2020.
- Each driver will have varying impacts in different regions and countries.

- The drivers can be mutually reinforcing and in some cases, they will work at cross-purposes.

A framework was then developed to explore the ways in which these trends would influence tourist values and attitudes, and the management of tourism destinations and tourism enterprises including new product and service development (see Fig. 1).

The six segments, economic, political, environmental, technological, demographic, and social, influence three key tourism facets – the destination (destination management), enterprise (enterprise management) and tourist (values, needs, flows). Further, the destination and enterprise on the one hand and the tourist on the other influence new product development. The spheres of influences are graphically depicted in circular mode, indicating the dynamism of the situation.

At a second stage of the project, industry was engaged to provide input. Three workshops were held in Brisbane, Melbourne and Sydney with public and private sector participants representing destination management organizations (DMOs), small to medium tourism enterprises (SMTEs) and education institutions. At each workshop, participants were asked to consider the implications of the global trends for destination management, enterprise management and new product development to 2020.

In total, 80 persons participated in the workshops split 40% each from the private sector and public sector and 20% from education. At each workshop participants were broken into three groups: DMOs, educators and SMTEs. The format of each workshop was as follows. First, the authors provided participants with a 15 minute overview of the global trends considered to comprise tourism's 'remote environment' and to set the context in which tourism will develop in the future. Second, the participants were asked to discuss the questions and develop an action agenda that tourism decision makers in both the private and public sectors in Australia can undertake as part of a proactive strategy to achieve destination and operator competitive advantage internationally over the next 15 years. Participants were encouraged to identify what is being done and what could be done to develop an appropriate action agenda for tourism industry stakeholders and to highlight the implications for destination and enterprise management. By this means the views and perspectives from representatives of industry and government organizations were obtained as to the perceived impacts of the trends and the implications for tourism planning, priority areas, new product development, barriers to success and marketing. The workshops thereby assisted the project team to better understand the potential impact of megatrends from the bottom up rather than imparting feedback on megatrends from the top down and assisted in detailing recommendations as to

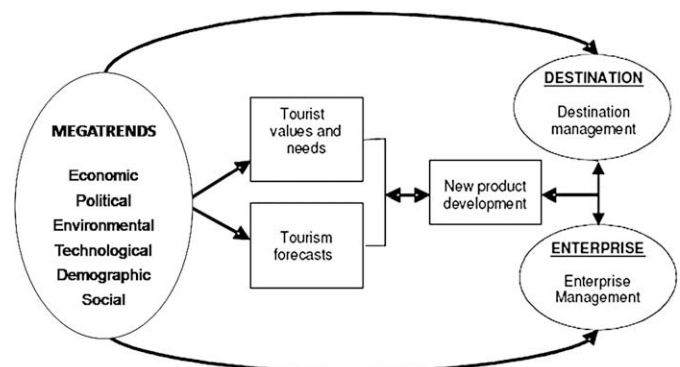


Fig. 1. Influence of megatrends on tourism.

stakeholder strategies to maintain, and ideally enhance, Australia's destination competitiveness in 2020 and beyond (Dwyer et al., 2008).

3. Global drivers of tourism change

Space limitations preclude a detailed discussion of the influence that the global trends play as drivers of tourism change. Some of the more important issues are discussed briefly below.

3.1. Economic drivers

Globalization results in easier access across borders, which for the tourism industry may mean more foreign tourists as well as increased global competition from international tourist destinations. Most projections indicate that the world economy is likely to continue growing impressively at least over the next decade and a half (Third World Network, 2001). The projected dynamic world economy is forecast to provide the basis for increased international and domestic tourism. Studies indicate that rising income is the most powerful generator of tourism flows (Crouch, 1994). The main factors that will combine to promote widespread economic dynamism and growth and continue to drive globalization include:

Improved macroeconomic policies. The widespread improvement in economic policy and management sets the stage for future dynamism.

Deregulation/liberalization. Efforts to remove barriers to international travel by means of the ongoing liberalisation of transport and other forms of deregulation are expected to continue.

Rising trade and investment. International trade and investment flows will grow, spurring increases in world GDP.

Diffusion of information technology. The pervasive incorporation of information technologies will continue to produce significant efficiency gains in developed economies. Countries and groups that can access and adopt new technologies will realise the greatest benefits of globalization.

Increasingly dynamic private sectors. Rapid expansion of the private sector in many emerging market countries will spur economic growth by generating competitive pressures to use resources more efficiently.

Economic liberalisation and globalization entail risks and, inevitably, there will be problems, some of them potentially highly disruptive. Possible brakes to growth include downturns in key economies with attendant spill over implications for other economies, disputes over international economic rules, and situations of unequal growth prospects and distribution (Stiglitz, 2006). The countries and regions most at risk of falling behind economically are those with endemic internal and/or regional conflicts and those that fail to diversify their economies.

3.2. Political drivers

Political drivers can be grouped under three themes – international power, security (including biosecurity), and regional and ethnic conflict.

International power. The USA is likely to remain an important influence but with its relative power position eroded an enlarged Europe will increase its weight internationally. China and India will emerge as new major global players and transform the geopolitical (and tourism) landscape (NIC, 2004).

Security. The key factors that spawned international terrorism are likely to continue over the next 15 years, and the threat of terrorism is likely to become more decentralized, due to Internet use (NIC, 2004). Security, including biosecurity, issues will herald stricter border controls, thus creating barriers or deterrents to tourism. The growth in tourism brings with it the unprecedented

risk of infectious disease and other health-related crises and destinations must develop coping strategies for such contingencies (Perz, Allen, & Schaffner, 2001). Whilst these concerns have encouraged the growth of 'enclave tourism' such strategies need to be re-examined to ensure resorts do not render tourists more vulnerable to threat.

Peace, safety, security, and political stability are fundamental requirements for sustainable tourism development (Cavlek, 2002). Political stability is an important precondition for the prosperity of tourism in any destination. Conflicts between countries will constrain tourism flows overall but can also benefit destinations perceived to be 'safe'.

Regional and ethnic conflicts. are likely amongst Lesser Developed Countries (NIC, 2004). Islam is expected to continue as a focus of global attention and the Middle East situation will have capacity to substantially increase the fuel costs of travel. As the discussion of globalization indicated, the gap between the "haves" and "have-nots" will widen unless the "have-not" countries pursue policies that support application of new technologies and with assistance from the "haves". Climate change may also lead to a rise in conflict over scarce resources particularly water.

Populations are responding to the globalization of economies, markets, systems and cultures by exploring their own identities (Croucher, 2004). This tension between 'modernity' and 'identity' is likely to lead to the increasing questioning by local communities of the form and scale of tourism development and type of destination marketing in those societies. On the other hand, there seems likely to be substantial opportunity for the development of tourism experiences related to the cultural and natural resources of these subsets of society. Such experiences would have particular appeal to tourists who are highly educated, mature, affluent, well-travelled, environmentally aware and sensitive to the social and cultural traditions, systems and mores of the destinations they visit (UNWTO, 2002).

3.3. Environmental drivers

Tourism is closely linked to the environment. The natural environment and climate conditions are very important in determining the viability and attractiveness of a region as a tourist destination (Dwyer & Kim, 2003). Tourist developments tend to be based near attractive or unique features of the environment enabling visitors to gain easier access to interesting natural or man-made environments. Typically the concern of tourism stakeholders, including researchers, has focussed on how tourism development may provide enhanced opportunities for the effective management of environmentally sensitive areas and the preservation of unique environments. In recent years, however, the focus has shifted toward the part that tourism can play in reducing environmental pollution and demands on resource use (United Nations Environment Programme (UNEP), 2002). The main environmental trends include climate change, natural resource depletion and loss of biodiversity:

Climate change. Climate change and global warming are exacerbated by the influence of rising concentrations of greenhouse gases being released into the atmosphere. Climate change is a global phenomenon and its impacts are transboundary; however, the major effects will be felt at the local and regional scale. Impacts of climate change and warming trends include: sea-level rise, changes to ocean currents, glacial and polar ice melts, loss of snow cover, high heat index and high diurnal temperatures, and changes to precipitation patterns (IPCC, 2007).

Climate change will influence which destinations will be preferred by tourists and which ones will cease to be as attractive. In addition to affecting natural tourist attractions, climate change will impact on the profitability of the industry through increasing costs

of energy use. Policies to reduce greenhouse gas emissions will inevitably impact on operator costs and destination competitiveness particularly for long haul destinations (Dwyer & Forsyth, 2008).

Natural resource depletion. A number of effects arise due to the increasing scarcity of natural resources needed to drive industrial development. Rising population and economic development are affecting the availability of natural resources – food production, water and energy. Fossil-fuel based energy sources will become increasingly more expensive as a result of ‘peaking’ in oil production, known as ‘Peak Oil’. ‘Peak Oil’ refers to the maximum rate, i.e. ‘peak’ of production of world oil ‘beyond which it goes into irreversible decline. Declining oil production coupled with increased demand will result in higher fuel costs. Consequently, the new ‘carbon economy’ is set to increase the demand for energy efficiency and investment in renewable forms of energy. At the same time, water shortages will leave over half the world’s population facing water-stress with conflict over scarce water resources expected to increase into the future. Demands for higher food production will increase impacts of extensive and intensive forms of agriculture and broad-scale land clearing will impact on arable land and diminish native bushland.

Loss of biodiversity. Habitat loss will continue to be the main threat to species loss and biodiversity (UNEP, 2003). Loss of biodiversity is expected to substantially impact those destinations that emphasise nature based or eco tourism.

3.4. Technological drivers

Technological developments create opportunities as well as pose threats to the tourism and travel industry (Buhalis, 2000; Mistilis & Daniele, 2004). Tourism is highly dependent upon information and transport technology. The industry also needs innovations and scientific discoveries to renew and develop its products and services. The success of tourism enterprises will continue to hinge on their efforts to add value to products and services through the use of technology producing competitive advantage. Successful tourism managers must be able to imagine, perceive, and gauge the effects of oncoming science and technology upon demand, supply, and distribution. The evolution and revolution in technology will continue to influence the suppliers of the various tourism industry sectors, the visitor and the industry business environment as a whole. Two aspects of the revolution in science and technology are of particular relevance to tourism: information and communication technologies and improvements in transport technology.

Information and communication technologies. The new technologies with sophisticated database management systems provide businesses with the tools to respond to individual preferences and stimulate tourism purchases. New technology enables an increasing proportion of tourism organizations to achieve the dual goals of reducing operating costs and increase their ability to add value for their customers. At the same time, interactive access to product offering via the Internet gives tourists unprecedented control over how they spend their time and money (Buhalis, 2003). New technologies globally compete with tourism by delivering new forms of entertainment in or near the consumer’s home.

Transportation. Faster and more comfortable transport is increasing the accessibility of destinations worldwide. New technology is improving the speed and reducing the real cost of travel however as reductions in greenhouse gas emissions are expected to be only incremental the transport sector will continue to face the ongoing challenge of reducing social and environmental costs associated with travel (pollution, congestion, safety). Uncertainty factors are future rises in fuel costs and the

policies enacted to reduce greenhouse gas emissions (Stern, 2006).

3.5. Demographic drivers

Unprecedented demographic shifts and social changes are having profound effects on virtually every social institution (Dwyer et al., 2008). The demographic trends include:

Population and aging. Growing world and aging population, with increasing age complexity (NIC, 1999). Children are growing up faster but more adults want to be teenagers. “Baby boomers” demand products and services that cater to their aging needs (Cetron, 2001). It also means that businesses will need to develop ways for ‘senior or ‘older’ citizens to stay in the workforce longer.

Urbanisation. There is a worldwide trend toward urbanisation. The number of very large cities, megalopolises of more than 10 million people, will double to about 30 (United Nations, 2005). Managing huge cities will be a significant new problem. As a consequence travellers will tend to favour holidaying away from crowds, and are spoilt for choice globally. The growing urban congestion in both the industrialised and developing worlds leads to the increasingly felt need to engage in discretionary tourism to escape and/or to indulge (UNWTO, 2002). Subsequently cities will need to work hard to illustrate that they are destinations that are worth visiting for more than a short break, and for more than one visit.

Changing social structures. Household types are diversifying away from the traditional ‘nuclear’ family in developed economies. Changing Social Structures will continue, with Generation Y the largest and most diverse demographic (Gerkovich, 2005). The family holiday remains, but the greater growth will occur in holidays for the retired, and for single people. Successful marketing to such groups will involve tapping into the mindset of target segments, to determine how they think – not just how they behave.

Health. People are increasingly concerned about their health and well-being. Greater value is being placed on de-stressing and self-medicating (Pollock & Williams, 2000). A high standard of public health in developed countries has contributed to increased longevity. This will result in increased demand for a combination of health and travel products and in developed countries there will be a blurring of working life and retirement (Cetron, 2001).

Changing work patterns. People are demanding to work flexibly, and will not be willing to sacrifice their personal and family-related goals for their careers (Gerkovich, 2005). The distinction between work and leisure will continue to blur. Changing work patterns will allow for more flexibility of travel plans.

Gender. Society is becoming more feminised, with the traditional distinction between the roles of men and women becoming more blurred. Women have increasing influence on all the key consumption decisions (Iida, 2005).

Education. The globalizing economy and technological change inevitably require a more highly skilled labour force. Increasingly education will be a determinative of success for destinations and businesses. This includes innovative businesses that are well attuned to their customers needs and staffed with highly educated workers valued as ‘human capital’ and organizations with external knowledge focusing on organizational culture that enshrines life-long learning (James, 1997). It also includes social infrastructure that maximises opportunities for individuals and businesses to be innovative, learn and develop knowledge, skills and access knowledge services.

3.6. Social drivers

Parallel to changes in demography are changes in people’s values and needs, aspirations and expectations. Social trends are

affecting the values of consumers in diverse ways. In the developing countries, several emerging values can be said to characterize populations these are: money rich-time poor, individualistic, experience seeking, desirous of self-improvement, demanding value for money, experimental but impatient, socially and environmentally aware, and safety conscious (Dwyer et al., 2008). We can briefly discuss each in turn:

Money rich-time poor: In developed countries, further growth of “money rich-time poor” people implies a high demand for short time holidays. Greater flexibility in working hours can provide benefits to employees in terms of greater freedom to choose when to go on holiday. This is important for tourism opportunities. The greater pressure on “time” and rising “stress” levels leads to growing emphasis on the means of “escape” through holidays. Time-pressured business people will increasingly add leisure time in their business travel (Willmott & Graham, 2001).

Individualism: People will increasingly tailor holidays to meet their particular requirements. An increasingly “travelled” consumer will seek the unusual and the authentic experience rather than the shared, off-the-shelf holiday package. People are increasingly interested in discovering, experiencing, participating in, learning about and more intimately being included in the everyday life of the destinations they visit. Consumers increasingly demand more choice, more interactivity and more personalized products from which to choose (Alford, 2005; Education Commission of the United States, 1999). As travellers become more experienced, they are no longer satisfied to be processed through an impersonal, non-interactive system of ‘mass tourism’.

Seeking a variety of experiences: People increasingly expect a broad range of activities to be available at the destination (Elliot & Johns, 1993). One result of the experience economy and tourism has been a fragmentation of the tourist market into subsets of unique experiences. The evolving tourist is also referred to as the ‘experiential’ traveller. The experience economy is generally based on customized holidays and personalized services allowing travellers to participate more actively in the experiences (Nordin, 2005).

Self-improvement: People are increasingly interested in discovering, experiencing, participating in, learning about and more intimately being included in the everyday life of the destinations they visit. At the same time individuals are becoming more interested in self-improvement as part of the tourism experience with an emphasis on health, well-being, education, skill development and cultural appreciation. Travel and tourism experiences will be increasingly factored in to the values and lifestyles of the growing middle class worldwide. A worldwide trend seems to be that people are going on holiday to learn something. Despite the tendency for travellers to take short breaks, there is a counter trend toward high value added and extended vacations that are purpose driven by education, wellness, or other forms of programmed self-improvement (UNWTO, 2002). For increasing numbers of tourists some people, a holiday, instead of being a form of consumption, is becoming an investment – investment in themselves. Consequently, the barrier between leisure and education will blur to such an extent that it will virtually disappear.

Seeking value for money: People are typically becoming more critical, less loyal, seeking value for money, not necessarily low prices. People are prepared to pay good money for a quality experience and this might benefit the up-market end of the holiday market, involving perhaps exotic locations. Many Internet users are experienced travellers, who have seen what package tours can offer, and are now demanding tailored holidays, or choices from ‘modules’ which can be combined to meet their overall requirements (Nordin, 2005). Emphasis will increasingly be placed on ‘value for money’, as opposed to the cheapest package deal.

Experimental: In the developed countries in particular, people are extremely experimental, willing to try new products, foods and

attractions, but too impatient to give a second chance to a product or service that fails to satisfy initially (Cetron, 2001).

Increased social and environmental awareness: Individuals, particularly those in the developed countries, have an increased social and environmental consciousness, seeking ‘authentic’ tourism experiences. They wish to be involved as participators not spectators and seek a variety of optional experiences as a tourist. There is also an emerging conflict between consumerism and a wider concern for the community and societal impacts of business operations. Affluent consumers are turning to ethical consumption (Yeoman, 2005). This refers to the motivation to purchase that which lies beyond the stimulus of price, quality and opportunity and which invokes environmental and social concerns.

Safety conscious: Increasingly, tourists are demanding assurances of safe products and services prior to purchase. Since tourist behaviour is as constrained by perceived risk as it is by actual risk operators need to address perceptions of risks as well as the risks themselves (Lepp & Gibson, 2003).

Each of the global trends has tourism relevance and no single driver or trend will dominate; each to a greater and lesser degree influences the other and will have varying impacts in tourism destination different regions, countries and industry sectors. The drivers are not necessarily mutually reinforcing; in some cases, they will work at cross-purposes. Taken together they set the context in which the global tourism industry may be expected to develop to 2020. As illustrated in Fig. 1, the global trends provide the context in which to discuss and debate the future of tourism demand and supply and the type of tourism industry that will be successful in the future. If tourism managers are to be proactive rather than reactive in strategic response to these influences they do need to identify and understand the major types. Thence they can begin to formulate and implement strategies to deal with specific drivers of change.

The following sections will focus on the outcomes of the workshops: the implications of the global trends for tourism industry public and private sector management including new product and service development. While the stakeholder workshops generated discussion of the implications for Australian tourism managers the issues raised are of interest to destinations worldwide.

4. Implications for destination management

Workshop participants views on the implications of global trends for destination management can usefully be classified under five headings- sustainable tourism development, climate change, target marketing, risk management, and education. The major items emerging from the workshop discussions are summarized in Fig. 2.

4.1. Sustainable tourism development

Workshop participants were strongly of the view that destination managers should adopt sustainability principles to underpin tourism development. This is consistent with the widespread view that destinations should measure tourism success not by number of visitors but by ‘yield’ per visitor, defined narrowly as an economic measure or more broadly as incorporating economic, social and environmental dimensions.

Participants believed that a *sustainable yield* focus, rather than a *growth* focus, is likely to be a winning strategy for most destinations. Higher economic yields would increase value added per capita from tourism business activity, increasing the ratio of economic returns to resources used, while lower growth would put less pressure on carrying capacity (e.g. water, pollution, etc.), thus providing environmental and social benefits. Some workshop participants argued that consumers should be educated to want new

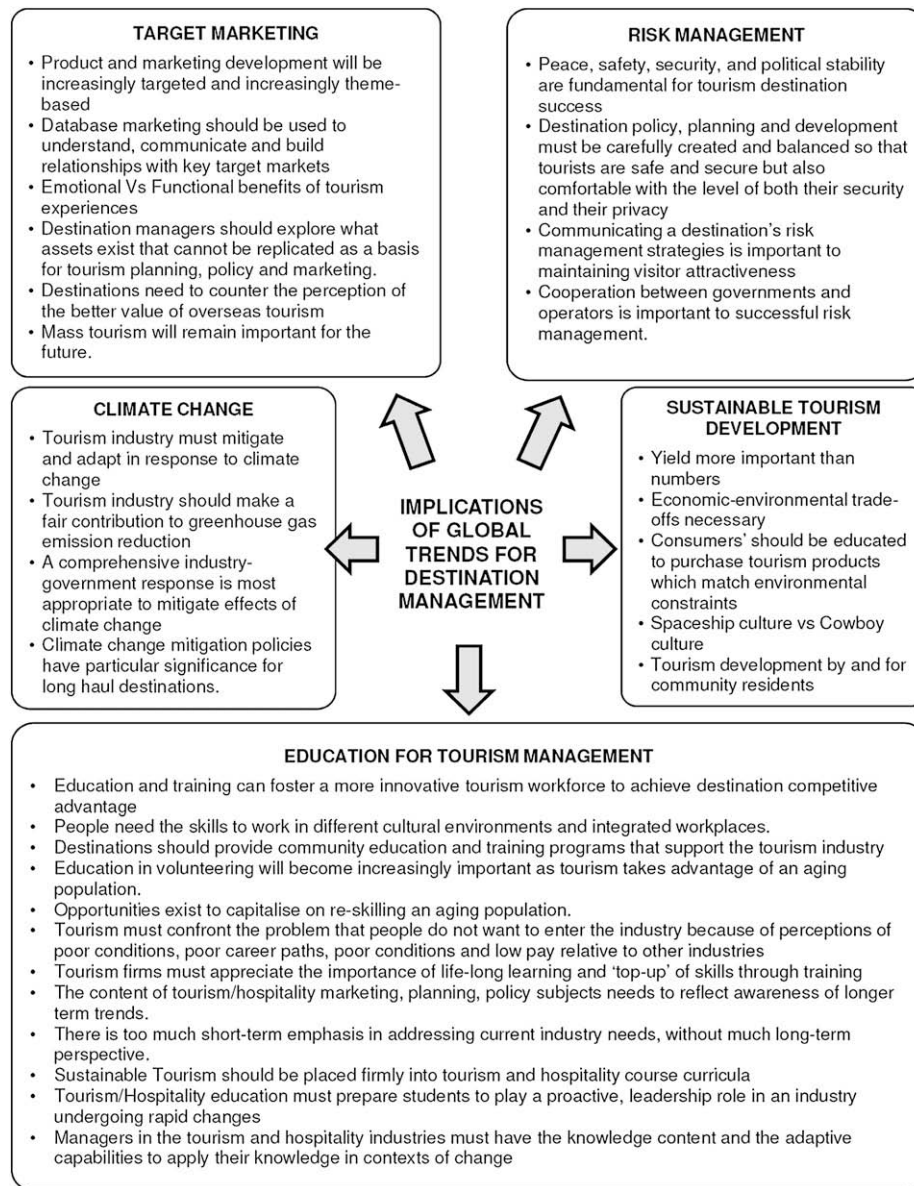


Fig. 2. Implications of global trends for destination management. Source: Industry workshops conducted by authors, March/April 2007.

adventure products which match environmental constraints (e.g. low energy use products). This reminds us that meeting visitor needs should be harmonious with a destination's environmental objectives. One problem that will need to be confronted, however, is that simultaneous achievement of relatively high economic and environmental goals is not possible, and that economic-environmental trade-offs may be necessary (Lundie, Dwyer, & Forsyth, 2007).

Workshop participants emphasised that a sustainability focus requires destination managers to foster a 'spaceship culture' within the industry rather than a 'cowboy culture'. The former involves awareness of the importance of developing a tourism industry that delivers economic, environmental and social goals which are net beneficial, as opposed to adoption of a growth ethic unconcerned with long-term sustainability. Since tourism development is increasingly being integrated into overall industrial development it was also argued that tourism stakeholders need to be aware that industry balance is an important consideration in government policy making.

Workshop participants voiced their encouragement for tourism development programs to include benefits for and utilization by community residents, including small business opportunities as well as jobs. This would be consistent with the growing trend for trade in tourism to be "fair" in its distribution of the rewards of tourism to destinations, particularly in the developing country destinations.

4.2. Climate change

Workshop participants were very mindful of the need for the industry to play its role in minimising the impacts on climate change. There was consensus that the tourism sector must mitigate and adapt in the face of global warming and explore and put in place more climate-friendly and climate-proof alternatives, and that destination managers who are serious about developing tourism in a sustainable way should agree that the tourism industry should make a fair contribution to our efforts to reduce greenhouse gas emissions and other pollutants. In particular, the rapid growth

in aviation emissions contrasts with the success of many other sectors of the economy in reducing emissions.

Without action, such as the imposition of carbon taxes, costs to economies from the growth in emissions will grow much faster than loss of benefits to tourism industry stakeholders, a view supported by Stern (2006). Participants agreed that the benefits to the economy from timely action by the tourism industry to invest in reducing emissions, mitigation, and adaptation capacity will far outweigh the costs involved. They also agreed that a comprehensive industry-government response is most appropriate for success in mitigating the effects of climate change. Trade-offs are inevitable, however, and enhanced environments may well come at the expense of higher priced tourism transportation and accommodation with consequent impacts on visitor numbers. The particular adaptation policies in response to climate change will have particular significance for long haul destinations such as Australia which already have expensive airfares associated with their tourism industries.

4.3. Target marketing

Workshop participants agreed that product and marketing development will be increasingly targeted and increasingly theme-based. In addition to the view that database marketing should be used to understand, communicate and build relationships with key target markets it was agreed that future marketing efforts must go beyond mere descriptions of the diverse and individualized attractions of the destination to emphasise the emotional benefits associated with a valued set of experiences. In particular, the industry generally needs to better understand differences in generational attitudes among its different existing and potential visitor markets. The workshop views were consistent with the UNWTO (2002) view that destination marketing will be broadly oriented to one or a combination of three E-words: Entertainment, Excitement and Education (UNWTO, 2002).

Workshop participants argued that destination managers should explore what assets exist in their regions (including a country as a whole) that cannot be replicated as a basis for tourism planning, policy and marketing. Destinations and operators must market and sell online with user friendly sites targeting their specific markets and fully integrated reservations systems. These sites must result from and be an integral part of the organization's business plans.

There was also support for the view that destinations need to counter the perception of the better value of overseas tourism destinations should give more attention to increasing the 'bragability' of domestic destinations/holidays. This is an important way to boost the domestic tourism industry which in many countries (e.g. Australia, New Zealand, USA) is the 'bread and butter' of the national tourism industry contributing the great proportion of its revenues and profit.

A caveat was also introduced by the workshop participants. Industry stakeholders cautioned against neglect of 'mass' tourism markets. There was substantial agreement that destination managers must understand that mass tourism is not dead and that this market will remain important for the future.

4.4. Risk management

Industry stakeholders were unanimously of the view that peace, safety, security, and political stability are fundamental requirements for tourism development success at the destination level. They emphasised that tourists' perception of safety and security in the destination will continue to constitute an important competitive advantage. To this end, destination policy, planning and development must be carefully created and balanced so that

tourists are safe and secure so far as is possible but also comfortable with the level of both their security and their privacy. They also agreed that communicating a destination's risk management strategies will be important to maintaining visitor attractiveness and that cooperation between governments and operators was important to success in this endeavour.

4.5. Education for tourism management

Workshop participants advanced a host of ideas relating to industry education. There was substantial support for the view that education and training can foster a more innovative tourism workforce to achieve destination competitive advantage. In particular, it was claimed that industry needs to improve their knowledge and skill base in order to improve their innovative capabilities. Participants felt that training would be required to provide people with the skills to work in different cultural environments and integrated workplaces. However, despite the increasing awareness in the industry of the importance of skilled personnel to deliver quality services to customers, workshop participants observed that only a small proportion of tourism businesses invest in tourism education and training for employees.

Many workshop participants held the view that destinations should provide community education and training programs that support the tourism industry. In particular, education in volunteering will become increasingly important as different sectors, including tourism, seek to take advantage of an aging population. There was large support for the view that opportunities exist to capitalise on re-skilling an aging population.

Participants observed that the industry must confront the problem that people do not want to enter the industry because of perceptions of poor conditions, poor career paths, poor conditions and low pay relative to other industries. To help secure committed and productive employees industry needs to promote itself to the community (e.g. to schools) and emphasise its economic value to that community. At the same time, industry needs to be educated as to the benefits of employing graduates with specialized knowledge of business and management and e-commerce.

Educational theorists have pointed out that since technology and communications are continually changing the way we live, life-long learning is essential (Education Commission of the United States, 1999). Workshop participants also emphasised this need. At each new turning, our old skills become obsolete and we are forced to learn anew. Since persons now entering the labour force can expect to have several entirely separate careers before their working days are over, firms need to appreciate the importance of life-long learning and 'top-up' of skills through training. Until tourism becomes a viable long-term career prospect, many capable students will not pursue a career in the industry.

Workshop participants agreed that the content of tourism/hospitality marketing, planning, policy subjects needs to reflect awareness of these longer term trends. They argued that there is too much short-term emphasis in addressing current industry needs, without much long-term perspective. In their view, tourism and hospitality education in Australia is typically not providing the necessary wider skills base for students. Course content needs to address cultural sensitivities, language skills and a perceived lack of student 'worldliness' as part of the education package. In particular, there was strong support for the view that the principles and practices of Sustainable Tourism should be placed firmly into tourism and hospitality course curricula. A major challenge for Tourism/Hospitality education and training is to convey to students and hence the future leaders of the tourism industry, the nature of these 'environmental influences' and their implications for sustainable tourism development.

Another view widely upheld by workshop participants was that there is a need for employees to have a broader understanding of the tourism industry and how it operates across all sectors. Workshop participants argued that Tourism/Hospitality education must prepare students to play a proactive, leadership role in an industry that is undergoing rapid changes on both the demand and supply sides. In contexts of continuous change, it is important that students be instructed in decision-making tools that can aid 'best practice' management in different tourism and hospitality sectors. The new breed of managers emerging in the tourism and hospitality industries must have the knowledge content, but, more importantly, must have the adaptive capabilities to apply their knowledge in contexts of change. This requires instructors to enhance students' problem solving ability by emphasising the role of theory in helping to solve real world problems in dynamic contexts. It is the students' problem solving ability that will help them as future managers to achieve competitive advantage for their organizations in industries experiencing continued rapid change and educational curricula must recognise this.

5. Enterprise management

The global drivers of change have particular implications for tourism operators. We herein discuss the strategies for enterprise management that workshop participants considered should be employed in response to the global trends. Not surprisingly, the themes which were identified at the operator level are largely consistent with those that were considered to be most important for destination management. The major items emerging from the workshop discussions are summarized in Fig. 3.

5.1. Sustainable operations

Workshop participants emphasised that industry should be encouraged to embrace 'clean green' tourism by which is meant that firms should attempt to reduce the environmental effects of their operations. If a destination is to achieve sustainable tourism development then the actions of its constituent firms must be consistent with and support this objective. Support for this view comes from recognition by researchers that the 'green' business can increase profits and that this equates to 'good' business (Hartma & Stafford, 1997).

Workshop participants also emphasised that tourism firms should adopt a Triple Bottom Line (TBL) approach to sustainable development to ensure that firms integrate social, environmental and economic information into managerial decision making. Firms must aim to achieve sustainability in their operations if the destination as a whole is to conform to sustainability principles. Participants argued that tourism businesses have a vested interest in protecting the (natural, social, cultural) environment that draws tourists, but while observing that many lack the long-term vision to adopt environmentally appropriate management strategies. Many participants emphasised that tourism enterprises are too focussed on the short-term and in order for industry to meet future challenges they will need to engage in long-term planning. Interestingly TBL reporting in tourism is now being discussed in the research literature where it has recently been argued that operators and organizations should adopt the philosophy of TBL reporting (Dwyer, 2005), and attempt to maximise 'sustainable yield' (Dwyer et al., 2008).

Another interesting view emerging from the workshops was that due to increasing environmental and social concern by tourists, new product development cannot be overly reliant on environmentally and culturally sensitive environments because of undesirable impacts and carrying capacity constraints.

5.2. Innovation in product development

A number of views were advanced at the workshops as to the broad types of products and services that operators should develop consistent with the global trends.

Workshop participants unanimously agreed that product development will need to respond to an environment of greater individual choice. It was observed that larger numbers of tourists are seeing themselves as 'individuals' even though they are engaging in 'mass practices' such as inclusive tours. They seek out products that acknowledge this individuality. To cater for the trend toward increased individualism, tour operators will need to structure their itineraries around optional programs and increasing schedule flexibility. As products are now consumer driven, industry must respond to changing markets or lose competitive advantage.

Recognising the value which tourists put on their time, workshop participants agreed that operators must increasingly consider how tourism products and marketing systems interact with the time value needs of their customers. Tourism operators must develop information response systems and transportation links that save customers time. Workshop participants emphasised the need for enterprises to better link into new transport opportunities from increased air travel, for example, through the development of local destination tours both group and self drive/hire. It was also considered that opportunities exist for suppliers to promote and develop products that offer the traveller the maximum thrills in the minimum time. It was noted that theme parks, including activity centres are increasing in popularity, as are cruise holidays where the consumer experiences a large number of destinations and attractions in a short period of time.

Mindful that changing work patterns allow for more flexibility of travel plans, workshop participants agreed that 'all-inclusive' holidays will continue to be demanded by a large number of people with needs for complete, unburdened relaxation and release from job pressures. However, they also agreed that there will be a growing emphasis on multiple holiday taking, including domestic short breaks, rather than a long main holiday. This will imply a much higher frequency of travel each year by the most active participants. The workshop view was that operators should increase the availability of short break packages targeted to regional markets and provide convenient packages that link overnight city stays with excursions to special interest attractions. This is consistent with forecasts that in the developed countries, the demand for 'weekend getaways' will grow rapidly and that multiple, shorter vacations spread throughout the year will continue to replace the traditional two week vacation due to time constraints and job insecurities (Alford, 2005). That industry in Australia should better attempt to capitalise on the domestic short stay, time poor market was emphasised strongly by workshop participants. The opportunities for this are, of course, dependent on the geographic size of a destination and the quantity and quality attractions offered. In some destinations (e.g. Singapore) the opportunities for domestic tourism to substitute for international tourism are limited compared to destinations such as USA or Australia.

Noting that the tourism industry will need to serve not only a more demanding and knowledgeable consumer, but also one that is more able and adventurous, participants argued that operators should attempt to become 'experience providers' developing personal encounters, and authentic experiences, designed to create long lasting memories, engaging travel, and increased customer loyalty. This strategy can attract new customers as well as generate repeat visits. It supports the growing emphasis in the research literature regarding the importance of today's world as the 'experience economy' (Pine & Gilmore, 1999).

Workshops participants agreed that there will be a growing emergence of rich-packers (wealthy urban professionals that return

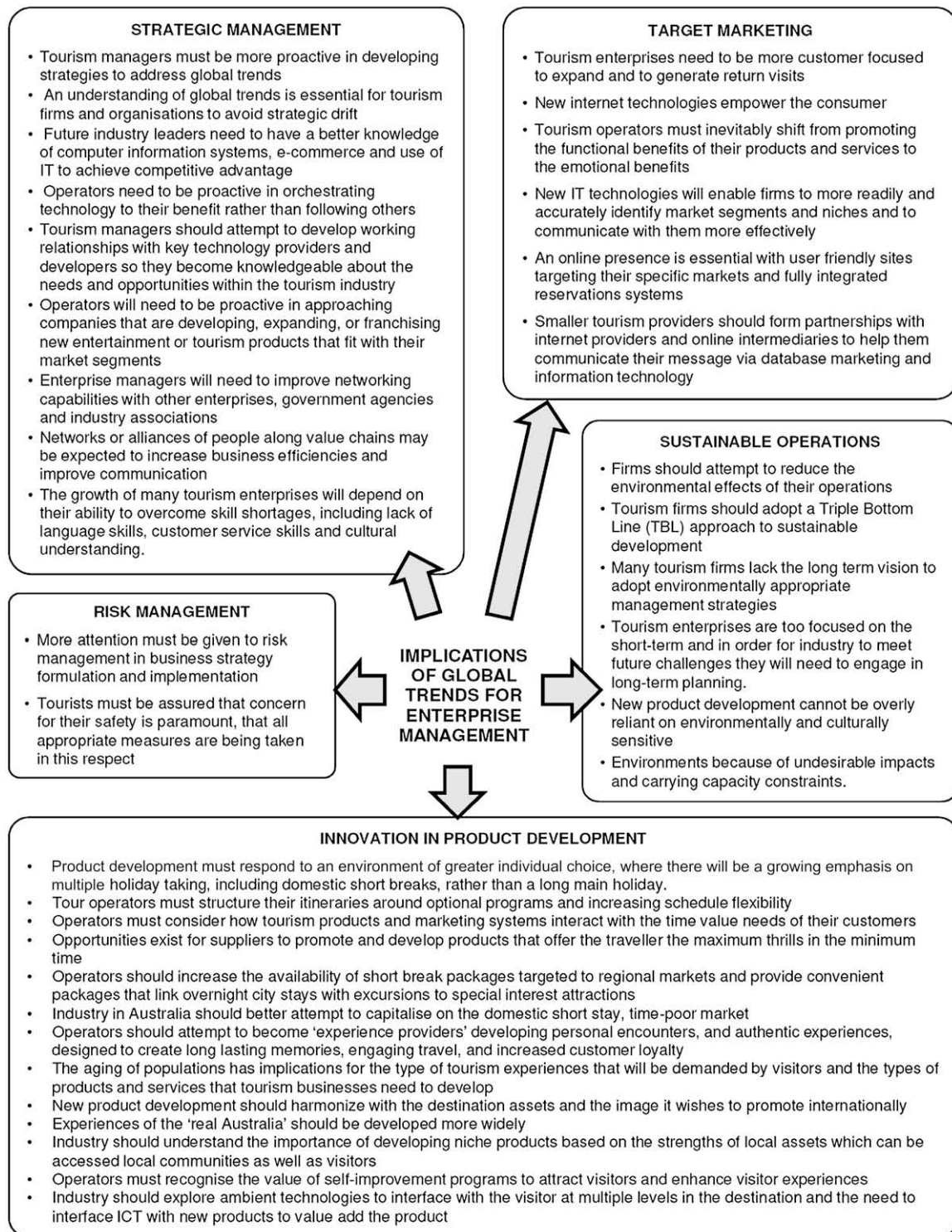


Fig. 3. Implications of global trends for enterprise management.

to the countries they once visited as penniless back-packers). They felt there was a need for new product development to incorporate the range of tourism experiences that will be demanded by the seniors segment. This view is consistent with research emphasising that the aging of populations combined with improvements in health and subsequent longevity will expand the seniors market globally (Coleman, Hladikova, & Savelyeva, 2006).

Workshop participants emphasised also that new product development should harmonize with the destination assets and the

image it wishes to promote internationally. In particular, they emphasised that experiences of the 'real Australia' should be developed more widely. They argued that there is a need to re-create authentic rural experiences in urban environments to bring the 'Australian' experience to consumers and that Australia's unique natural environment should be better employed as experiential tourist products with educative potential. This is to recognise that destination managers and operators should attempt to create differential experiences in their destinations to set themselves apart

from competitor destinations and that these experiences can be better branded the closer they reflect the unique heritage values of the destination. As such it is consistent with strategies recommended for operators to achieve competitive advantage (Dwyer & Kim, 2003). Workshop participants also emphasised the importance of developing niche products based on the strengths of local assets which can be accessed local communities as well as visitors. This is often a neglected element in tourism planning.

It was also acknowledged that operators will need to recognise the value of self-improvement programs to attract visitors and enhance visitor experiences (e.g. short course culture, archaeology, history, literature, and ecology programs, health and wellness programs, sports training programs, etc.). The development of products that cater for the growing demand for 'doing' or activity based holidays' such as sport and hobbies will be competitive in the market place. There was strong support for the view that operators can apply multimedia technology to improve the interpretation of tourism attractions and the presentation of handicrafts and cultural programs.

Workshop participants emphasised the need for industry to explore ambient technologies to interface with the visitor at multiple levels in the destination and the need for innovative communications technologies (ICT) with new products to value add the product. In this way also operators can provide high quality interpretation of environmental and cultural/ethnic attractions. Researchers now emphasis that interpretation is a key component of any tourism experience (Beck & Cable, 2002).

5.3. Strategic management

Workshop participants emphasised that tourism managers need to be more proactive in developing strategies to address global trends. The importance of good management practice was recognised. Given the changes in the external environment, tourism enterprises must be managed strategically – that is managers must formulate, implement and evaluate cross-functional decisions that enable an organization to achieve its objectives in the face of changes in the external environment. It was recognised that the challenge that confronts any private and public organization is how to lay the foundations for tomorrow's success while competing to win in today's market place.

Participants observed that environmental change may not always be gradual enough for incremental change to keep pace within tourism enterprises. This phenomenon is known as 'strategic drift' in which an enterprise gradually if imperceptibly moves away from addressing the forces at work in the environment (Johnson & Scholes, 1997). If incremental strategic change lags behind environmental change a tourism enterprise or organization may get out of line with its environment and in time need more fundamental or transformational change. The workshop participants agreed that an understanding of global trends is essential for tourism firms and organizations to avoid strategic drift and that an understanding of these key issues improves decision-taking and reduces uncertainty.

Workshop participants strongly held the view that enterprises will need to be proactive in knowledge creation, product development and knowledge sharing to grow overall destination competitiveness. To this end, future industry leaders need to have a better knowledge of computer information systems, e-commerce and use of IT to achieve competitive advantage. This is also consistent with management theory which holds that knowledge management must be increasingly embedded and embodied in an organization in order to be able to anticipate change, take informed action and develop new products, services and marketing approaches (Becerra-Fernandez, González, & Sabherwal, 2004). It was also argued that operators need to be proactive in orchestrating

technology to their benefit rather than following the lead of others. Tourism managers should attempt to develop working relationships with key technology providers and developers so they become knowledgeable about the needs and opportunities within the tourism industry.

Workshop participants observed that the concentration of power within the sub-sectors that make up the travel and tourism sector continues to grow. There was strong support for the view that firms can benefit from forming strategic alliances for such purposes as destination marketing and product development. Many held that operators will need to be proactive in approaching companies that are developing, expanding, or franchising new entertainment or tourism products that fit with their market segments.

There was general support for the view that enterprise managers will need to improve networking capabilities with other enterprises, government agencies and industry associations. Some participants went further, arguing that firms that do not explore the possibilities for strategic alliances may well place themselves at a competitive disadvantage.

Workshop participants also observed a growing tendency for firms to access more of the value chain. Increasingly, business managers are looking beyond their enterprises and think and act in terms of 'value-chains' – from primary producers to final consumers. Value chain management is increasingly associated with the development of clusters and other cooperative arrangements (Allee, 2003). Participants observed that networks or alliances of people along value chains may be expected to increase business efficiencies and improve communication up and down the chains. It is likely that tourism enterprises all along the value chain that implement best management will achieve better: economies of scale; market intelligence and market feedback; quality control; and cooperation along the value chain.

A further issue raised at the workshops was that the growth of many tourism enterprises will depend on their ability to overcome skill shortages, including lack of language skills, customer service skills and cultural understanding. This is to recognise that responsibility for tourism education is not solely the province of the public sector but requires private sector involvement as well.

5.4. Target marketing

Workshop participants expressed the concern that tourism enterprises, in Australia at least, are insufficiently customer focused. They argued that tourism enterprises need to be more customer focused to expand, and to generate return visits. They also claimed that the big challenge in marketing will be to deal effectively with the ever increasing and diversifying array of desires, interests and tastes on one hand, and the tourism products offered in response, on the other hand. This perspective is consistent with the view increasingly espoused in the management and marketing literature wherein 'customer orientation' is considered to be a major factor in successful innovation of new products and new services (Cooper, 2001).

While conceding that many new Internet technologies empower the consumer, greatly enhancing their power in the marketplace, workshop participants argued that tourism operators must inevitably shift from the promotion of the functional benefits of their products and services to the emotional benefits such as reverie/escape, status-enhancement, stress-alleviation, and reward and social-skill confirmation. There was strong support for the view that the use of electronic technology will enable firms to more readily and accurately identify market segments and niches and to communicate with them more effectively. Industry stakeholders also argued that to ensure consistency in the marketing message, operators need to collaborate on the 'fit' between destination products and visitor preferences. The importance of this 'fit' has

been emphasised in the destination competitiveness literature (Dwyer & Kim, 2003).

Workshop participants were strongly of the view that enterprises must improve their database and management systems to increase visitor flows and tourism operators should market and sell their experiences in multi-channel environments. An online presence is essential with user friendly sites targeting their specific markets and fully integrated reservations systems. Through the generation of relevant and exciting content, firms can take advantage of online engaged communities such as YouTube, Flickr, Facebook, mySpace and Second Life.

Theorists have argued that firms need to identify changes in technology that will affect the growth, quality, and marketing of tourism. In particular, they should monitor the extent to which new telework and video communication technologies affect routine forms of business and personal travel (Buhalis, 2003). Workshop participants were also of the view that smaller players can benefit from technology as the Internet makes it possible for marketing activity to be undertaken on a more level playing field whereby small businesses can connect directly to consumers and to compete for market share on an even footing with larger firms. It was also suggested that smaller tourism providers need to form partnerships with Internet providers and online intermediaries to help them communicate their message via database marketing and information technology, a view also advanced by Yeoman (2005).

Workshop participants advanced the view that if residents are to regard domestic tourism experiences as good substitutes for outbound tourism, industry stakeholders need to educate the population that the domestic and regional product can be exciting and different to those offered overseas. This reminder of the importance of domestic tourism is timely as domestic tourism is often relatively neglected as a result of focus on the more glamorous international sector. And yet, as Porter (1998) emphasises, a robust domestic industry is often a pre-requisite to achieving international competitiveness in any industry.

5.5. Risk management

Workshop participants claimed that more attention must be given to risk management in business strategy formulation and implementation. In their view, a major challenge for tourism firms is to implement risk management strategies, including staff education and training, so they are prepared for any incident and can respond swiftly, confidently and appropriately – thus minimising business loss. Risk management theorists would agree with this while emphasising that such strategies should be part of their business management plans and driven by the highest level of management (Alexander & Sheedy, 2004).

Workshop participants were strongly of the view that tourists need to be assured that concern for their safety is paramount, that all appropriate measures are being taken in this respect. It was also noted that the ability to deal with continuous but unpredictable change requires flexible and agile decision makers and that the development of risk management strategies is crucial to sound business management in the face of uncertainties.

6. Conclusions

Six global drivers, Political, Economic, Social, Technological, Demographic and Environmental, were incorporated into a framework to identify the main drivers of future tourism supply and demand. While unable to control the powerful forces driving tourism demand globally, the industry response must be a combination of action to control what it can and adaptation to minimise what it cannot. Tourism stakeholders have, to some extent, the opportunity to fashion the future to their needs rather than simply to regard future

events as beyond their control. In an increasingly turbulent and rapidly changing world, innovation and development driven by both internal and external circumstances will continue, but destinations and firms not adjusting their strategies as their environments change will have difficulty maintaining competitive advantage.

Workshop participants identified several themes relevant to both destination and enterprise management. Undoubtedly, there are other issues that were not raised or discussed in the workshops and it is not implied that the issues raised are the only ones that are relevant or important in management strategies to fashion tourism futures. Nevertheless, the themes identified may be expected to play an important role in strategy formulation and implementation by private and public sector organizations in tourism in the context of ongoing global changes. It is these themes that will help set the action agenda for tourism into the future. The views of the industry representatives were seen to be consistent with directions which the research literature is taking in respect of the identified themes.

While the workshop participants were Australian tourism stakeholders the ideas generated have global relevance. The types of changes taking place in the global industry present both challenges and opportunities to public and private sector organizations around the world to 'construct the future' to the greatest extent possible as they seek to achieve a sustainable tourism industry. Understanding and meeting these forces can assist tourism organizations and entire destinations to avoid strategic drift and achieve competitive advantages over rivals.

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