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## **TOURISM IN SOUTH AFRICA - A FUTURE PERSPECTIVE**

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# Tourism in South Africa – a future perspective

by

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## 1. Introduction

Tourism has been accepted by the South African government, business and labour as one of the key drivers for the creation of wealth and economic empowerment (GCIS, 1994:1490). This notion is supported by the fact that tourism is acknowledged internationally as one of the world's fastest-growing industries (Shaw & Williams, 1994:174; Cooper et al., 1993:1; Kerzner, 1995; Anon, 1994(a)). Further support of this is the fact that the World Tourism Organisation (WTO) forecasts that the number of people travelling internationally would increase to 1,6 billion by the year 2020 (World Bank, 1998: WTO, 1998; WTO, 2001(a)). If the target as predicted by the WTO is reached, it would result in an increase in tourism revenue in the next seventeen years of almost \$2 000 billion a year (Van Zyl, 2000:30).

Back home, Fraser (1999:6) forecasts that South Africa's tourism industry will grow by more than 5,5% per year between 1998 and 2010, which is better than the 4,1% predicted for the global market. It is also estimated that arrivals will increase from 6 million international tourist arrivals in 2002 to 30,5 million in 2020 (WTO, 2001(a)). The African continent can treble the size of its tourism industry by 2020 if proper efforts are made. This will result in projected tourist arrivals of 77,3 million in Africa. On the African continent, South Africa attracts the most overseas tourists, which makes tourism one of the largest industries in South Africa (WTO, 2001(a)). Research indicated that tourism in South Africa contributed approximately 4,6% to the Gross Domestic Product (GDP) over the past four years. In 2002 tourism arrivals increased by 16%, ranking it one of the highest growth rates in the world (Thomton & Feinstein, 2002:44; GCIS, 1998:146). For the overseas as well as the local tourists, scenic beauty and wildlife remain the major tourism attractions that South Africa has to offer (GCIS, 1998:147; GCIS, 1999:150). Globally people accept the fact that tourism is the largest growing industry and that it also employs the most people (Saayman,

2003). In South Africa tourism has been recognised by government as an important industry for various reasons, of which the following will suffice:

- It creates employment
- It can accommodate people from all walks of life – skilled and unskilled
- It generates foreign exchange
- It has a significant multiplier effect
- It promotes conservation and preservation
- It stimulates economic growth
- It contributes to development of infra- and suprastructures
- It accommodates SMME'S
- It attracts investment
- It builds nation pride.

These and other advantages have led to a situation where governments, especially in developing countries, have started to realise the potential of tourism if it is managed well. South Africa has done the same and all tiers of government are involved in playing an ever-increasing role in stimulating economic growth and development through tourism (Saayman & Saayman, 2002). The reason for this is that growth in other sectors are limited: mining, for example, has a limited lifespan, and the country has serious water shortages as well as droughts which impact negatively on agriculture. In view of the above, one realises that tourism development in South Africa is relatively new, as is the case in other countries around the world as well. Today's massive tourism industry is driven by a number of factors, the future directions of which need to be considered. These factors are:

- Growth in real incomes;
- The advancement in personal wealth as expressed in the ability of individuals to generate resources beyond those needed to pay for life's basic needs - food, housing, clothing, education, health and, in more recent times,

'essential' consumer goods - in other words, the expanding ability for discretionary expenditure on non-essential items;

- Growth in tourism awareness;
- Increased leisure time;
- Increased mobility;
- Growth in number of destinations;
- Freedom within international currency markets (Lockwood & Medlik, 2001).

South Africa's primary overseas markets remain the UK, Germany, USA, France, and the Netherlands. In Africa the important markets remain SADC countries and specifically Lesotho, Zimbabwe, Namibia, Botswana, Swaziland and Mozambique. An analysis of international arrivals indicates that South Africa has increased its tourist arrivals significantly since 1994 (Table 1). In 1994 South Africa received 3,6 million tourists and in 2002 this figure almost doubled to 6,4 million.

**Table 1: International arrivals**

YEAR	ARRIVALS	GROWTH
1994	3 668 956	-
1995	4 488 272	18.25%
1996	4 944 430	9.23%
1997	4 976 349	0.64%
1998	5 731 424	13.17%
1999	5 890 507	2.7%
2000	5 872 254	-0.31%
2001	5 787 368	-1.47%
2002	6 429 583	9.99%

**(SA Tourism)**

From this table the growing importance of tourism in South Africa since 1994 is apparent. But what can be expected from tourism in South Africa in the future? This paper will focus on two distinct periods in the history of tourism in order to present a future perspective. Therefore the paper is organised in the following fashion. Firstly, the purpose of the paper will be discussed, followed by a historical analysis; thereafter future tourism perspectives will be discussed, challenges identified and recommendations made.

## **2. Purpose**

Based on the above, the purpose of this paper is to analyse the past and present trends and to forecast future trends of the tourism industry in South Africa. This paper is based on a literature review and more than a decade of research and analytical work in the field of tourism development and marketing in South Africa by the author.

## **3. Analysis of past and present trends in tourism**

In tourism many researchers make use of metaphors, specifically with regard to nature. This paper will use the hyena metaphor. This metaphor is based on the observation that in a hyena's quest to move forward, it will pause at any moment and look back in anticipation of what might happen next. The meaning of this metaphor is that it is necessary to reflect on the past and present in order to position the industry for the future. In doing this, tourism development in South Africa can be divided into two distinct phases, namely pre- and post-1994. Instead of referring to these periods as pre- and post-apartheid eras, the state of the tourism industry in each era may be better described by referring to two distinct figures influencing tourism in each era, namely Sol Kerzner and Nelson Mandela. The former significantly influenced tourism in South Africa knowingly and deliberately, and the latter did so unintentionally and indirectly.

The reasons for choosing these two figures as a symbol for each era respectively can be explained as follows.

Pre-1994

This era is known for the entrepreneurial abilities of Sol Kerzner, who developed the hotel and casino industry in South Africa to international standards. He is also the first non-American to be inducted into the US Gaming Hall of Fame. During this time he initiated the establishment of the Southern Sun and Sun International hotel groups. He also developed the first five star hotel in South Africa. Other features of this era include:

- In the previous dispensation South Africa consisted of four provinces and a number of homelands.
- The South African tourism industry was established during this phase and the new focus was primarily on domestic tourism.
- It was also the era in which resorts were developed both inland and at the coast. This development introduced a new concept, namely timeshare. The 1980s in particular were marked by a growth in the number of timeshare apartments.
- Coastal towns and marine tourism became popular.
- Foreign tourists became aware of South Africa as a tourist destination, although for the wrong reasons.
- Various tourism organisations were established, like SATOUR and the HOTEL Board.
- Tourism received limited acknowledgement and recognition from government. The focus of government was primarily on mining, manufacturing and agriculture.
- Expansion of national parks by the former South African National Parks Board purely for conservation reasons was a priority.



- The institutional framework of this period was one of centralisation. In other words, marketing and policy development were done by the national government.
- The former Satour was responsible for both domestic and international marketing and there was little competition between the four provinces from a tourism perspective. The international marketing focus was primarily based on the theme of "Sun Sea and Sand", with a slogan of "A World in one Country".

#### Post-1994

This era is known as the post-apartheid era and came about with the first domestic elections in South Africa in 1994. It is marked by an emphasis on the transformation and integration of society in order to redress the inequalities of the past. Nelson Mandela, even though he was not actively involved in the development of tourism per se, played a significant and indirect role in establishing and transforming tourism in this era, especially from a marketing and promotion perspective. Other characteristics of this era are:

- South Africa and the homelands were unified and nine provinces were introduced, each with its own tourism authority to promote and develop tourism. This led to greater competition between the provinces, which also resulted in a significant growth in tourism facilities and infrastructure.
- South Africa was officially recognised as a global tourism destination.
- As a result of a steady growth in foreign tourism South Africa improved from 52<sup>nd</sup> to 25<sup>th</sup> place as the most visited international destination.
- Black empowerment started to transform the industry slowly but surely.
- Diversification of tourism products took place.
- There were major increases in funding as well as acknowledgement from government.
- The concept of transfrontier parks was created and its implementation was started, with the ultimate goal to contribute to tourism growth and

development. Major growth in the Southern African countries necessitated an increase in tourism policies and legislation.

- The institutional framework of this era is one of decentralisation. At first Sator, now known as South African Tourism (SAT), had regional offices in South Africa, but these were closed when the mandate of SAT changed to international marketing only. Provincial authorities were tasked to perform domestic marketing.
- Tourism training as well as the number of training providers in South Africa increased significantly.
- Local authorities were also given a mandate to promote and develop tourism. This has, however, not realised in all new municipalities in South Africa. The district councils provide bulk infrastructure together with local authorities.
- National government introduced the SDI concept (Spatial Development Initiatives), which also creates infra- and suprastructures in order to promote tourism in Southern Africa.
- Retosa (Regional Tourism Organisation For Southern Africa) was established by the SADC (South African Developing Countries) countries to promote tourism to these countries.
- SAT, with its mandate to promote international tourism, has done a comprehensive market segmentation exercise in order to promote South Africa more scientifically, with a slogan describing South Africa as an all-year destination.
- Concepts such as eco-, sustainable, adventure-, wildlife- and nature-based tourism and cultural tourism became the buzzwords.
- The country also took note of space tourism, and the second space tourist in history was a South African.

The major differences in approach between the two eras were with regard to:

- politics (from apartheid to a democracy)
- tourism approach (from an internal focus to an external focus)
- tourism concepts and buzzwords

- institutional framework (from a centralised approach to a decentralised approach)
- funding (from an insignificant tourism budget to a priority budget for tourism).

### **The scientific contribution of Tourism at Potchefstroom University**

The first course in tourism to be offered at a university was at the Potchefstroom University for Christian Higher Education, the leader in tourism research in South Africa. Tourism was introduced in the early 1990s and has contributed significantly to developing tourism as a science and field of study in South Africa. The following contributions were made:

First textbooks:

- on parks and recreation management in South Africa
- on an introduction to tourism (as a field of study)
- on tourism marketing
- on events and sport tourism
- on ecotourism
- on game farm tourism
- on a comprehensive approach to tourism management
- on how to start your own tourism business.

Contributions to themes and concepts include:

- definitions – tourism, tourists, ecotourism, sport tourism, sex tourism, events tourism, game farm tourism, guesthouse management, tourism marketing, tourism product, marine tourism.
- themes of research:
  - crime and tourism
  - disabilities
  - SMME's
  - quality service

- ❑ tourism legislation
- ❑ sport tourism
- ❑ economic impact
- ❑ cultural tourism
- ❑ festivals and events
- ❑ game farm tourism
- ❑ parks management
- ❑ market segmentation
- ❑ target marketing
- ❑ positioning
- ❑ branding
- ❑ image
- ❑ competitiveness.

#### **4. Future trends**

Forecasting is most probably the most difficult thing to do, especially when it concerns an industry that is rapidly changing and expanding. Looking back at tourism development in South Africa, it is an indisputable fact that tourism is expanding at a rapid rate. The same is happening all over the world. Based on the impact of globalisation on the tourism industry, the following notions on which future trends in tourism are built were identified (Lockwood & Medlik, 2001).

#### **Tourism dominates the economy and society**

As tourism is the largest industry in the world, there is a massive awareness of tourism taking place across the globe. The only factor slowing this process will be a lack of trained and skilled people to exploit all the opportunities.

### **The population of the developed world is living longer**

In the developed countries, healthier diets, more exercise, the decline of smoking in the United States and the trend toward preventative medicine are extending life expectancy. The elderly population is growing fast throughout the developed world. In Europe, the United States and Japan the aged also form the wealthiest segment of society. Many older people still want to indulge in the same activities and entertainment they enjoyed in their youth, and they now have more disposable income to spend on these.

### **Time is becoming the world's most precious commodity**

Forecasters once imagined that computers would make it possible to cut the working week and give us more leisure. Instead, the opposite has happened. Companies have cut employee rosters, often dramatically, leaving more work to be done by fewer people. Rising costs and stagnant wages have driven former stay-at-homes into the labour force. Entrepreneurs, whose numbers are growing rapidly and who have begun to expand elsewhere, work even longer hours than those who are formally employed. Time that once would have been spent on shopping and taking care of household chores is now spent in factories and offices, and leisure is becoming ever more scarce. There is no sign that this trend will slow in the near future.

### **Values and lifestyles are changing**

Technology brings new opportunities, but conflicts with tradition. Telecommunication brings news from around the globe. Western ideas infiltrate conservative cultures in Africa, Asia and the Middle East, often triggering a 'fundamentalist' backlash. These and many other pressures are eroding the values and lifestyles of previous generations. Consumer needs are changing under this pressure. International and intercontinental travel and tourism for business and pleasure are becoming a normal part of life for most well-to-do

workers and their families. Growing numbers of adults say their lives are too stressful, and they have a need for convenience and a relaxing atmosphere.

### **Lifelong learning will become essential**

Technology and communications are rapidly changing the way humans live. New discoveries in science are increasing at an exponential rate, while consumer products based upon those discoveries proliferate even more rapidly. Within a few years, new technologies create entire new industries, while the industries they replace wither or disappear. This enhances the notion of lifelong learning. Tourism, in essence, is about an experience by enhancing the learning process.

### **Concern for environmental issues continues to grow**

As rain forests disappear and evidence of global warming is mounting, it is becoming ever more difficult to ignore human impact on nature, and the consequences of that impact for humans in turn. Pollution, urbanisation and waste management are all real threats to the environment.

### **Institutions are undergoing a bimodal distribution**

In one industry after another, the big get bigger, thanks to economies of scale. The small prosper by providing high levels of service in niche markets. The middle-sized, lacking either advantage, are either squeezed out or absorbed by larger competitors. This has been the single most powerful trend in business for the past 20 years, and the consolidation has yet to run its course. This trend is seen among hotels, retail stores, restaurants, private banks, hospitals, airlines and many other industries.

### **“Service, service, service” replaces “location, location, location”**

Even though location has always been and remains important, quality service can make or break a tourism offering. Competitive pressures are making it ever more difficult to distinguish one hotel or chain from the next, especially at the level of the global chains. As soon as one offers a product or service that

attracts customers, its competitors match it and try to improve on it. The result is a generally high standard in basic products and services. Increasingly, what distinguishes one provider from another is attention to detail. This is the battleground on which hotels and restaurants will fight the competitive wars of the early 21<sup>st</sup> century. Personal service and attention to detail set the best hotels, restaurants and resorts apart from the rest (Lockwood & Medlik, 2001).

Based on the above, the following trends have been identified, namely a trend towards:

- *Adventure-oriented holiday behaviour*: seeking a more intensive leisure experience.
- *Going it alone*: seeking even more independent holidays in line with personal ideas, with a preference for flexible holiday products. There is therefore a move away from mass tourism to more individual travel.
- *More sophisticated travel products*: seeking experiences that offer culture and education, as well as variety.
- *More wellness during holidays*: seeking forms of travel that offer the overwrought modern man holistic relaxation, with a healthy diet, gentle exercise, beauty and body care and a wide variety of therapies as the keywords.
- *'Second homes'*: seeking cosy holiday accommodation as home-like refuges with a high degree of comfort.
- *Sunny travel destinations*: seeking holiday destinations with guaranteed sunshine – above all during cold, wet winters.
- *Cheaper travel*: seeking (cheap) products that represent value for money.
- *More frequent, shorter trips*: seeking products that offer occasional variety, and more but shorter holidays.
- *Spontaneous travel decisions*: seeking offers that can be booked at the last minute (or even at the last second) and which are not only cheap but also comprise an element of surprise.

- *More mobile travel patterns:* seeking products with frequent changes of location, with travelling as the major attraction.
- *More environmentally friendly travel and tourism products.*
- *Higher quality of both tangible (facilities, transport) and intangible (services) tourism products* (Lockwood & Medlik, 2001; Saayman, 2001).

From this analysis the six major types of tourism for the next few decades are identified as:

- Sport and adventure tourism
- Ecotourism/ nature-based tourism/ wildlife tourism
- Space tourism
- Marine ecotourism
- MICE tourism
- Wellness tourism.

The question is whether South Africa can capitalise on these types of tourism. The answer would probably be yes, with the possible exception of space tourism, due to the cost involved. All the other types of tourism are readily available and will have to be managed. One type of tourism that will have a significant impact in terms of planning, cost of development and management, is wellness tourism. This will include a fresh look at how facilities are planned and developed, with an emphasis on health and wellness.

## **5. Challenges for the future**

The following challenges for the future need to be taken into consideration in order to manage future demand:

### *The challenge of globalisation*

In a world that is getting smaller and technology bigger, needs are changing rapidly. Everything is in a state of flux: demand, labour, know-how and capital are all flowing to where the biggest hopes for the future lie, with the resultant



standardisation of production technologies, business strategies, marketing plans and management styles. Globalisation leads to more marketing and awareness, which creates a greater demand. The latter will have to be satisfied by the tourism industry of the future.

#### *The challenge of the changing climate*

Change in climate has serious implications for tourism in the long run, because tourism is also seasonal. Climate determines when it rains or snows and when it is hot or cold, and therefore it does not only determine the four seasons, but it also impacts on seasonal tourism patterns.

#### *The challenge of an ageing population*

Setting aside the fact that the populations of highly industrialised countries may be considerably influenced by the influx of refugees, the assumption can (or must) be that the population of the industrialised countries is stagnating. This has serious implications for the South African tourism industry and specifically for marketing.

#### *The challenge of changing values*

The process of changing values is equally turbulent. It is characterised by a basically hedonist attitude (desire, enjoyment, living out one's dreams) which, however, goes hand in hand with a certain pessimism about the future. The system of shared basic values that makes for social cohesion has now virtually disappeared (Van Hove cited in Keller, 1996).

The so-called 'mega-generation' makes itself heard loud and clear, and its values are mainly as follows:

- Substantial material demands;
- Little willingness to do anything special to merit these;
- Call for more freedom in all areas of life;
- Growing escapism;

- Growing unwillingness to take orders from others;
- Fewer inhibitions;
- Individualisation of the masses.

#### *The challenge of quality training*

Quality training is the foundation of a quality product and remains a challenge. Quality training can be seen as training directed at a specific market, based on specific needs and provided by quality teachers and lecturers alike. A lack of service quality has always been and remains a major challenge. More training is not necessarily better. What needs to be addressed is the level or standard of training lecturers and training methods.

#### *The challenge of mobility*

The ability of a growing number of people to drive vehicles, combined with the individualisation of society, is leading to greater mobility, despite intensive debates about the ecological aspects or the impact that it will have on existing infrastructure.

#### *The challenge of mass leisure*

On the whole, people in employment will have more leisure time, in particular through additional free days and as the result of longer (unpaid) breaks among young people. It appears that in addition to mass prosperity, mass mobility and mass tourism, a kind of mass leisure is the hallmark of our society.

#### *The challenge of the growing domestic market*

The South African tourism industry still needs to do more work to involve more domestic tourists. There is a tendency of sharp increases in the prices of certain destinations and products in South Africa, because of a greater focus on the international market. This impacts negatively on domestic tourists. One should be careful not to create an industry for the elitist.

### *The challenge of NEPAD*

Political leaders' drive towards a New Partnership in Africa's Development (NEPAD) will eventually have an effect on the tourism industry in South Africa. Tourism in Africa and all its challenges also affect the South African tourism industry and therefore has to be managed now more than ever before.

### *The challenge of information dissemination*

This has been one of the major problems in the tourism industry and remains a challenge. Firstly, all stakeholders and structures need to play their part in order to address this challenge, and as the industry grows it does not get easier.

### *The challenge of changing travel habits*

Upheavals in the immediate and less immediate environment of leisure-conscious persons also affect their travel and holiday habits.

Keller (1996) describes the holiday of the future as follows:

- Attractive natural setting and clean landscapes are automatically expected.
- People will continue to seek sun, beaches and the sea.
- Artificial holiday paradises will become tomorrow's standard holiday venues.
- Holiday hopping ('here today – there tomorrow') will spread.
- Vacations will become the ultimate adventure.
- The holiday world of the future must be as exotic as possible.
- More and more young families will discover indoor luxury bathing complexes.
- Culture and study trips will develop into a stable market segment.
- Holiday clubs will lose their attraction as something out of the ordinary.

### *The challenge of health and safety*

Political instability, wars and terrorism create unsafe environments. In addition there is also the challenge of health issues, for example AIDS, SARS and other threats. These aspects make tourism a vulnerable industry.

#### *The challenge of segmentation and repackaging*

Segmentation should be very specific and based on that segmentation, various packages should be promoted. South Africa has to re-evaluate its current marketing strategy and adapt it for future trends. Currently the strategy is to remain with current markets.

#### *The challenge of sustainability*

The final and also a very important challenge is that of marketing, or of sustaining a particular growth rate, and also to sustain a quality experience which includes a quality environment.

### **6. Conclusion and recommendations**

The purpose of this paper was to analyse the past and the present of tourism in South Africa and to identify future trends. Two people in particular played an enormous role in driving tourism in this country, namely Sol Kerzner and Nelson Mandela. During a period of twenty to thirty years, the South African tourism industry has developed to where it is today. The future looks promising for the tourism industry. It is believed that tourism in South Africa will grow at a sustainable rate and there is an enormous willingness to make it a success. So far, South Africa has experienced a revival in cultural, sport, conference and events tourism, and all indications are that South Africa and Africa as a whole will continue to expand its tourism products. The question that needs to be answered is: Who will be the people that direct the future tourism industry?

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