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Research on the Tourist Industry in Latin America: Its Present Status and Future Needs

The potential of international tourism for contributing to economic development has been gaining rapidly in both understanding and financial support in recent years. Realization that international tourism offers many benefits to developing economies increased precipitously during the 1960's. While national programs for the development of a tourist industry vary considerably in scope and support among Latin American and Caribbean governments, by 1970 all had established a national tourist office and had expressed official interest in promoting the growth of their respective industries. Because of widespread interest in the development of tourist trade, coupled with rapid growth in heretofore little-visited areas, there is a very serious need for scientific investigations and analyses of this burgeoning industry.

The purposes of this paper are twofold: 1) To discuss the types and sources of information available presently to the student of tourist industry development in Latin America and 2) To propose some specific research topics designed to meet the changing demands of this dynamic industry.

A review of informational sources

For reasons not readily apparent, the research needs of tourism in developing areas have attracted very few serious investigators. Hence, both the quantity and quality of existing literature poses severe problems to those seeking to study tourism. Writing in 1963, Parsons observed similar neglect of the broad field of economic geography:

"Contrasting with the considerable emphasis on historical and cultural studies by geographers in Latin America has been the weak development of work in contemporary economic geography. This is the more remarkable in view of the major revitalization of this field that has occurred within the United States in recent years, in part through the introduction of new and more rigorous methods of regional economic analysis." (Wagley, 1964).

As is so often the case in developing areas, basic statistical data are lacking. Repeated efforts of The Organization of American States (OAS), The Caribbean Tourist Association (CTA), The International Union of official Travel Organizations (IUOTO), The United Nations Educational, Scientific and Cultural Organization (UNESCO), Confederación de Organizaciones Turísticas de la América Latina (COTAL), and others to standardize the collection and dissemination of basic industrial indexes (e.g., visitor number, ages, incomes, origins, length of stays, expenditures plus the types, amount invested and number of accommodations) have produced very disappointing results. While all Latin governments collect at least some information on the aforementioned topics, there is considerable variation among countries in quantity and quality of records kept. Consequently, no single comprehensive statistical source exists for the tourist industry in Latin America. Contacting the respective national government tourist offices directly remains the best means of obtaining maximum statistical information. Naturally, areas with larger tourist industries (e.g., Mexico, Chile, Puerto Rico, Jamaica, Colombia) have more complete records than those with less growth (e.g., Paraguay, Bolivia, St. Vincent, etc.). The United States Travel Service (Department of Commerce) maintains an up-to-date listing of addresses for all national tourist offices.

In addition to providing basic statistical data, national tourist offices sometimes generate research. These studies tend to be either analyses of pre-investment costs and feasibility (frequently for only a small area or even for a single resort site) or they may outline the overall potential for tourism in the respective country and serve as a "master plan" for future development. The work may be done directly by the personnel of the national tourist office or through subcontracts to private consulting firms. Typical of the government conducted studies are those of Peru (Corporación de Turismo del Peru, 1966), Puerto Rico (Martocci, 1957), Venezuela (Para, 1967), Colombia (Empresa Colombiana de Turismo S.A., 1968), and Chile (Dirección de Turismo de Chile, 1969). Latin American governments have had numerous contracts with several American firms; including H. Zinder and Associates, Arthur D. Little, Inc., Sontheimer and Co., Checchi and Co. along with other firms such as Italconsult and Adelatec. The OAS maintains an up-to-date listing of such studies (*Estudios en el Campo del Turismo*, 1970). However, because of contractual arrangements, these documents commonly can be released only by the sponsoring Latin government. Annual reports of national tourist offices constitute another potential source of useful information. Largely because of the general scarcity of data, it is important that the prospective student of

tourism in Latin America realize that national tourist offices are likely to be one of his primary sources of information.

Supranational focus on Latin American tourism has been quite limited. If only general information is sought, the United States Naturalization and Immigration Service (Department of Justice) has records on gross departures, by mode of travel. Similar gross data are compiled annually by agencies such as CTA, IUOTO, the International Civil Aviation Organization (ICAC), the American Society of Travel Agents (ASTA), the South American Travel Organization (SATO) and the OAS.

The many tourism-oriented activities of the OAS must be considered another primary informational source of utmost importance to the researcher. OAS sponsorship of the Inter-American Travel Congresses constitutes the principal area-wide focus. Under Article 17 of the *Organization Plan for Inter-American Travel Congresses*, a committee is established to undertake

"...among other matters, studies on tourist bibliography, travel statistics, exchange of personnel engaged in tourism and on the integrating factors in tourist industry and local and national tourist organizations." (Pan American Union, 1957)

Despite this somewhat lofty statement, resolutions resulting from the intermittent Congresses probably comprise the most significant contribution of the OAS (Pan American Union, 1969) -- along with the tourist bibliographies, which are not yet complete (OAS, 1968, 1969; Decimo Congreso Interamericano de Turismo, 1968). Because the Travel Congress resolutions focus on current broad-scale needs of tourism, they are quite useful for understanding the developmental character and related problems of Latin tourism. Financial support for pre-investment studies in several countries is another form of OAS participation (OAS, 1970). Of limited importance are the occasional articles dealing with tourism found in the OAS publication, *Americas*.

In addition to the OAS's sponsorship of the Inter-American Travel Congresses, there have been numerous other international conferences and seminars arranged by IUOTO, UNESCO, SATO, COTAL and the InterAmerican Travel Seminars. These meetings tend to concentrate upon contemporary problems of tourist industries -- primarily from the viewpoint of the travel industry (e.g., hotels, travel agents, airlines, and cruise ship lines). However, published proceedings of these events are difficult to obtain.

While not emphasizing Latin America, *Tourist Bibliography*, published by IUOTO, undoubtedly is the single most important bibliographic source on tourism available. Being published three times per year and listing over 15,000 entries (written in all major languages), renders this source the most up-to-date and comprehensive index to tourist literature.

In addition to compiling travel statistics and organizing conferences, some international agencies have published works dealing directly with the tourist industry in Latin America (ICAO, 1968a, 1968b; Anderla, 1968; Zinder, 1969). Studies of this type usually survey tourism's potential for growth and the benefits to be accrued from its further development. Similar studies, emphasizing the tourist industry's potential for single regions or countries, have been sponsored by the AID, UNESCO, OAS and the International Bank for Reconstruction and Development (IBRD). For specific places and dates, consult OAS records (*Estudios en el Campo del Turismo*, 1970). Occasional articles in *Finance and Development*, published by the International Monetary Fund and the World Bank Group, present some insight into tourism in developing areas (Davis, 1968).

Private United States-based transportation firms such as the Boeing Company (1967), Douglas Aircraft (1969) and Pan American World Airways (for a complete listing, see OAS, 1970) have conducted reviews of Latin tourist potential -- designed primarily for the advancement of their own business interests. Nonetheless, they do present some statistical data and projections of growth prospects.

One of the most comprehensive and thorough analyses available for Central America, replete with specific recommendations, has been sponsored by the Central American Bank for Economic Integration (Ritchie, 1965). Latin universities have contributed very little (quantitatively) to the body of literature (Hernandez, 1968). Similarly, very little research on Latin tourism has been sponsored by United States universities (Voyles, 1956; Wolff and Voyles, 1956).

The sources of information mentioned so far can be categorized roughly into three groups -- either bibliographical, undigested statistical data or inventories of a region's tourist industry potential for development. Aside from the bibliographies, these works tend to be little more than descriptions of past tourist industry growth or discussions of the salient reasons for expanded investment in tourist plants. There are exceptions to this statement, of course, (e.g., university

publications and Ritchie, 1965) but it remains true that serious analysis of problems related to the growth of tourism or the lack of it, are in woefully short supply.

A careful examination of leading geographical journals reveals only very scant notice of the tourist industry in Latin America -- and this tends to be quite peripheral (Pearson, 1957; Sinclair, 1960; Carpenter, 1962; Blume, 1963; Stillwell, 1963; Mings, 1969). This is not to suggest that there is no relevance to Latin tourism stemming from the numerous studies on recreation, economic development and other related topics (Thomas, Schmudde, Harper, 1965; Deasy, Greiss, 1966; Naylor, 1967; Mitchell, 1970). Only a few dissertations and theses have dealt with tourism directly (Byran, 1957; Izcoa 1958; Suhm, 1963; Carpenter, 1964; Mings, 1966; Orlins, 1969; Ryan, 1969). While not focusing specifically upon the tourist in Latin America, there is considerable value in some of the more general studies on tourism and economic development available in book and monograph form (OECD, 1967; Sargent et al, 1967; IUOTO, 1968; Carlozzi, 1968). The number of these related works is very large and impossible to discuss briefly.

In summarizing the nature of literature on the tourist industry within Latin America, a few generalizations can be made. 1) Very little substantial material exists -- especially in conventional scholarly sources. 2) The information which is available consists mostly of preliminary statistics and descriptive accounts of the potential for growth in specific areas. 3) Direct contact with national tourist offices, private companies, international agencies interested in Latin tourist development and involved individuals are necessary first steps in any search for bibliographic materials. In the course of preparing this paper well over one hundred and fifty letters of inquiry were written to said parties.

Selected recommendations for research

From the foregoing discussion of tourism literature, it is very apparent that many important facets of tourism have not been researched. Hence, many potential benefits to be derived from scholarly inquiry are yet to be realized. Part II does not propose to identify all types of needed research, but merely to outline a few selected examples of work believed to be particularly relevant to present-day developments in the tourist industry.

The tourist industry is an important leading sector in the economy of many West

Indian islands. Yet little is known concerning the impact of the tourist industry upon agricultural production in islands such as Jamaica, Barbados, the Dominican Republic, Trinidad and Tobago. Presumably, the development and growth of tourist volume in these islands should lead to increased local demand for foodstuffs. It appears that there is a lack of supply response by the agricultural sector to the increase in demand by restaurants and hotels. Important issues for research, therefore, are: the extent of inter-industry linkages between agriculture and tourism, the reasons for lagged response by agriculturalists, the degree to which there are "unfulfilled" markets and the potential benefits to be gained by more adequately affecting linkages between agricultural production and demand for foodstuffs by the tourist industry.

If the development of tourism is to create maximum growth and benefit, the preservation of national values must be awarded a high priority. In areas where foreign-oriented tourism conflicts with time-honored local customs, and the examples are legion, numerous undesirable repercussions may occur. Valued landmarks and ways of living may be disrupted and allowed to deteriorate. Animosity may develop between native peoples and the tourist industry, perhaps ultimately focusing upon foreign visitors.

Unfavorable conditions resulting from public animosities and the loss of vital local support may result in a retardation of industry growth. During periods of rapid economic growth, nations are especially interested in preserving the basic structure of their cultures. Fear of domination by foreign economic, social and political ideologies has caused many countries to introduce counter measures for self-preservation (Parent, 1968; Cozier, 1970). Such resistance varies among countries, both in form and magnitude -- ranging from some extreme attempts to eliminate outside influence almost entirely to more moderate actions designed merely to reduce unnecessary alterations of indigenous ways of living (Mings, 1968). Areas with colonial histories have many citizens with strong desires to preserve their national identities. The term "national identity" is used here to signify traditional values and patterns of living. This pursuit of cultural preservation occasionally conflicts with efforts to expand and diversify national economies (Franklin, 1969). Perhaps the conflict between societal values and the growth of tourism is most exemplary of this paradox.

A clear need exists for a means of ameliorating the conflict which arises commonly between tourism and indigenous value systems. Unless this issue is resolved, valuable local cultures will be threatened and growth of the tourist

industry will be hampered. For most developing areas, both cultural heritage and the tourist industry constitute vital and scarce resources -- neither of which are expendable.

Many factors affect the rate at which a nation's tourist industry grows. A shortage of first-rate accommodations may constitute a serious constraint upon how many visitors a particular tourist plant serves. Obviously, if existing accommodations are filled to capacity, prospective visitors must go elsewhere. If data are available on a region's number of rooms, hotel occupancy rates and average length of visitor stay, then it is possible to determine how much unused capacity exists. By examining through time, the correlation of space available and visitor increases, insight into the importance of the former can be gained. In some places, lack of facilities has been the principal factor in limiting the growth of tourism (Mings, 1966). Naturally, if this condition is not recognized and corrected by adding facilities, potential benefits from increased growth will not be realized and, perhaps, scarce monies will be misdirected to solve the dilemma of slow growth (i.e., falsely spending more money on promotion or transportation). There is some indication that growth of tourism is now being affected by this type of development (Maidenberg, 1968).

To what extent is political instability a factor affecting the growth of tourist industries? Market-type surveys, employing interviews with tourists and prospective tourists, would be very useful to learn with some precision how tourists feel about visiting places where violence may be expected. To know what types of tourists will accept what types of risks in what amount, would be very useful information to planners.

In what capacity and degree can government assist the development of tourist industries? Surely the answer will vary with the type of government and tourist industry (OECD, 1967). However, a geographic analysis of selected areas may reveal some generalizations concerning the influence of government policies such as tax-incentives, direct investment in infrastructure and promotion.

What is the capacity of tourism to generate import substituting industries? What types of local industry can benefit and at what stages of tourism's growth? Those interested in overall integrated economic growth have a clear need for answers to these questions.

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