

1st WORLD CONFERENCE

Barcelona, Spain

22 - 23 February 2001



sport & tourism

Copyright © 2001 World Tourism Organization and International Olympic Committee

Sport and Tourism
1st World Conference

ISBN: 92-844-0468-1

Published by the World Tourism Organization and the International Olympic Committee

All rights reserved. No part of this book may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording or by any information storage and retrieval system without permission from the World Tourism Organization and the International Olympic Committee.

The designations employed and the presentation of material in this publication do not imply the expression of any opinions whatsoever on the part of the World Tourism Organization or the International Olympic Committee concerning the legal status of any country, territory, city or area or of its authorities or concerning the delimitation of its frontiers or boundaries.

ACKNOWLEDGEMENTS

This book is the product of the joint working group of the International Olympic Committee (IOC) and the World Tourism Organization (WTO), whose members include Fékrou Kidane, Director of International Cooperation, IOC; Katia Mascagni, Chief, Inter and Non Governmental Organizations, Education and Women's Advancement Section, IOC; Dr. Dawid de Villiers, Deputy Secretary-General, WTO; Augusto Húascar, Chief of Market Intelligence, WTO; and Deborah Lührman, Chief of Communications, WTO. The group was assisted in writing the results of the conference by Angel Díaz, Director of the AMS Group of Barcelona, Spain.

Production of this publication was supervised by Deborah Lührman. Cover design is by Eril Weihahn. Book layout and design by Graforama, Madrid. It was printed by the World Tourism Organization Madrid, Spain

Table of Contents

1. Introduction	05
2. Programme of the Conference	07
3. Executive Summary	11
4. Main results of the Conference	15
5. Official Conclusions	47
6. Annex One - Presentations	49
a) Opening Ceremony Mr. Francesco Frangialli	51
b) Opening Ceremony Mr. Juan Antonio Samaranch	55
c) Opening Ceremony Ms. Carme Laura Gil.....	57
d) Opening Ceremony Mr. Juan Antonio Gomez Angulo	59
e) Opening Ceremony Mr. Joan Clos	63
f) Sport and Tourism to Stimulate Development Dr. Dawid de Villiers	65
g) Economic Impact of the Olympic Games on Tourism Mr. Josep Miguel Abad	69
h) Infrastructure for Sport and Tourism Mr. Rémy Charmetant.	73
i) Structure of the Tourism Sector Mr. Martin Brackenbury	79

j) Sport Federations, Clubs and Supporter's Associations	
Mr. Joan Gaspart	85
k) The Memorabilia Business	
Mr. Manfred Bergman	89
l) Sport as a Part of Leisure Tourism	
Mr. Henri Giscard d'Estaing	95
m) Tourism, Sport and Culture	
Dr. Joseph Kurtzman	99
n) Tourism, Sport and the Environment	
Prof. Peter Keller	111
o) Tourism, Sport and Human Resources	
Dr. Lisa Delpy	117
p) Impact of Sport Events on Tourism Image	
Mr. Jean Penot	121
q) Joint Marketing of Tourism and Annual Sport Events	
Mr. Dario Dell'Antonia	125
r) Joint Marketing of Tourism and Annual Sport Events	
Mr. René Clerissi	127
s) The Olympic Games and Australian Tourism	
Mr. John Morse	131
7) Annex Two - Summary of two special studies prepared for the conference:	
<i>Introductory Report</i> by Prof. Peter Keller and <i>Sport Activities during the Outbound Holidays of Germans, the Dutch and the French</i> by IPK International	149
8) Annex Three - Bibliography	161

INTRODUCTION

Tourism and sport are key elements of today's culture and exert a very specific influence on the behaviour of present-day society. The dimension acquired by these two activities has generated effects that are already making a decisive contribution to economic and social development in a large number of countries. Nowadays, sport and tourism activities are organized all over the world without regard to national borders and irrespective of the meeting point or the location of the tourism destination. More particularly, the Olympic Games and worldwide and continental sports competitions are a source of development projects and travel on a massive scale; they contribute to shaping the image of the destination hosting the event and therefore continue to stimulate tourism even after its conclusion.

Tourism and sport are two forces that are conducive to accelerating convergence between countries and between the different social groups they bring into contact. The future bodes well for both activities, as a result of which more attention is focused on ensuring that development is based on criteria of sustainability rather than on development for development's sake. This concern is mirrored in the Olympic Charter and the Olympic ideal, and in the Global Code of Ethics for Tourism.

Hence the signing of a Cooperation Agreement between the International Olympic Committee (IOC) and the World Tourism Organization (WTO) at the end of 1999, in which both institutions solemnly commit themselves to taking steps to strengthen the links between tourism and sport. The aim of the Agreement is to promote a better appreciation of these two activities, reinforce their solidarity and increase their joint contribution to understanding between different nations.

It was this desire for joint action that engendered the commitment to organize a World Conference that would tackle issues geared to increasing our knowledge and understanding of sports and tourism and the relationship that exists between them, with the aim of increasing the benefits that stand to be gained by countries and by society in terms of sustainable economic development, the promotion of peace and understanding between people.

Organized by the IOC and WTO with the valuable collaboration of the government of Spain, the regional government of Catalonia, the Barcelona City Council and the Spanish Olympic Committee, the Conference took place on 22 and 23 February 2001 in Barcelona, the city that hosted the Games of the XXV Olympiad in 1992 and which has since strengthened its

tourism growth. The Conference was remarkably successful both in terms of attendance –800 people from 105 countries, representing past and present Olympic Games organizers, ministries of tourism and sports, sports federations and national Olympic committees, researchers, academics, media professionals and tourism promotion experts– and also in terms of quality, mirrored in the presentations and the debates that were sparked by the four main thematic areas.

This interest has paved the way for the implementation of new actions, a greater degree of in-depth research and the staging of a wide range of encounters that will gradually be included in the meetings already scheduled by our institutions.

We believe that this close relationship between sport and tourism, which encompasses so many challenges, has massive appeal both on account of its complexity and the positive spin-offs it can engender. We would invite everybody from the world of tourism and sport –i.e. a substantial part of our society– with an interest in working towards sharing and improving the future to join us in this exercise of reflection and action.

Juan Antonio Samaranch

Francesco Frangialli

PROGRAMME

WEDNESDAY 21 FEBRUARY 2001

15.00-19.00 **Accreditation of participants**
 Barcelona Conference Centre
 Avenida Reina Maria Cristina s/n.
 08004 Barcelona

THURSDAY 22 FEBRUARY 2001

8.00-9.30 Accreditation

9.30-10.15 **Opening Ceremony**
 Opening remarks by Mr. Francesco Frangialli, Secretary-General of the World Tourism Organization
 Opening remarks by Mr. Juan Antonio Samaranch, President of the International Olympic Committee
 Opening remarks by Ms. Carme Laura Gil, Counsellor for Education, Government of Catalunya
 Opening remarks by Mr. Juan Antonio Gomez Angulo, Secretary of State for Sport, Spain
 Opening remarks by Mr. Joan Clos, Mayor of Barcelona
 Opening of the conference by H.R.H. the Infanta Cristina de Borbón.

Break

Theme 1: Sport and Tourism in Economic Development

Chairperson: Mr. Lars Graef, Secretary of Sports, Ministry of Sports and Tourism, Brazil

Rapporteur: Prof. Michel Archambault, Tourism Chair, University of Quebec at Montreal, Canada

10.30-10.55 **Sport and Tourism to Stimulate Development**
 by Dr. Dawid De Villiers, Deputy Secretary-General, WTO

- 10.55-11.30 Discussion
- 11.30-11.45 **Economic Impact of the Olympic Games on Tourism**
by Mr. Miquel Abad, Director general of the Organizing Committee of the Games of the XXV Olympiad in Barcelona 1992
- 11.45-12.15 Discussion
- 12.15-12.30 **Infrastructure for Sport and Tourism**
by Mr. Rémy Charmetant, Director general, Departmental Touristic Agency, Chambéry (France)
- 12.30-13.15 Discussion
- 13.15-13.30 Conclusions of Theme 1 by the rapporteur
- 13.30 Press Conference
- 13.30-15.30 Lunch break

Theme 2: The Business of Sport and Tourism

Chairperson: Ms. Donna de Varona, President of the Organizing Committee Women's Football World Cup USA 1999

Rapporteur: Mr. Peter Velapan, Secretary General of the Asian Football Confederation

- 15.30-15.45 **Structure of the Tourism Sector**
by Mr. Martin Brackenbury, Chairman of WTO Business Council and President of the International Federation of Tour Operators.
- 15.45-16.15 Discussion
- 16.15-16.30 **Sports Federations, Clubs and Supporter's Associations**
by Mr. Joan Gaspart, President of the Football Club Barcelona
- 16.30-17.00 Discussion
- 17.00-17.30 Coffee break
- 17.30-17.45 **The Memorabilia Business**
by Mr. Manfred Bergman, World Association of Olympic Memorabilia
- 17.45-18.15 Discussion
- 18.15-18.30 Conclusions of Theme 2 by the rapporteur
- 20.30 Reception hosted by the Government of Catalunya + the Municipality of Barcelona, Museum of history of Catalunya, Port Vell.

FRIDAY 23 FEBRUARY 2001

Theme 3: Human Values fostered by Sport and Tourism

Chairperson : HE. Mr. Valery Tsybukh, Chairman of the State Committee for Youth Policies, Sport and Tourism, Ukraine

Rapporteur : Mr. Marcel Colman, Chairman of the Touring Committee, International Canoe Federation

- 9.00-9.15 Sport as a Part of Leisure Tourism**
by Mr. Henri Giscard d'Estaing, Deputy CEO of Club Méditerranée
- 9.15-9.45 Discussion**
- 9.45-10.00 Tourism, Sport and Culture**
by Dr. Joseph Kurtzman, Secretary general, Sports Tourism International Council
- 10.00-10.30 Discussion**
- 10.30-11.00 Coffee break**
- 11.00-11.15 Tourism, Sport and the Environment**
by Prof. Peter Keller, Tourism Chief, State Secretariat for Economic Affairs, Switzerland
- 11.15-11.45 Discussion**
- 11.45-12.00 Tourism, Sport and Human Resources**
by Ms. Lisa Delpy, Director of the Sports Management Programme, George Washington University
- 12.00-12.45 Discussion**
- 12.45-13.00 Conclusions of Theme 3 by the rapporteur**
- 13.00-15.00 Lunch break**
-

Theme 4: Marketing and Promotion of Sport and Tourism

Chairperson : Mr. Gerhard Heiberg, President of the Organizing Committee of the XVII Olympic Winter Games in Lillehammer 1994

Rapporteur : Prof. Graham Brown, University of Southern Cross, School of Tourism and Hospitality Management, Lismore, Australia

- 15.00-15.15 Impact of Sport Events on Tourism Image**
by Mr. Jean Penot, Inspector General of Youth and Sport, French Secretariat of Tourism
- 15.15-16.00** Discussion
- 16.00-16.15 Joint Marketing of Tourism and Annual Sport Events**
by Mr. Dario dell'Antonia, General Delegate for Tourism, Monaco, and Mr René Clerissi, President of the Protocol Commission, Monaco Automobile Club.
- 16.15-17.00** Discussion
- 17.00-17.30** Coffee break
- 17.30-18.00 The Olympic Games and Australian Tourism**
by Mr. John Morse, Director General of the Australian Tourist Commission
- 18.00-18.30** Discussion
- 18.30-19.00** Conclusions of Theme 4 by the rapporteur
General Conclusions / recommendations
- 19.00-19.30 Closing Ceremony**
Remarks by Dr. Dawid de Villiers, Deputy Secretary-General, WTO
Remarks by Mr. Fékrou Kidane, Director of the International Cooperation Department, IOC
Remarks by Mr. Javier Civit, Director of Tourism, Government of Catalunya
Remarks by Mr. Jordi Portabella, Deputy Mayor of Barcelona

Executive Summary

Until a short time ago, there was little coordination in the development of the two activities, sport and tourism, even though they shared many points in common. Now ever closer links and ties between them are to be expected. Being aware of this situation, the International Olympic Committee (IOC) and the World Tourism Organization (WTO) concluded a cooperation agreement at the end of 1999. The agreement was a formal statement of their intent to take the necessary steps to strengthen relationships between tourism and sport. Both organizations wish to promote understanding between these two activities and strengthening the contribution they can make to sustainable development and to mutual understanding between peoples.

This desire for action gave rise to the World Conference on Sport and Tourism held in Barcelona in February 2001, where aspects intended to enhance our knowledge of these two activities and increase our understanding of how they interact were analysed and discussed. The interest elicited by the Conference is helping us advance in the performance of new initiatives and more detailed research.

Sport and tourism have similar objectives: to help us draw closer to and understand other cultures and lifestyles, and to promote peace among peoples. From that vantage point, they have brought together two complementary worlds that seek the betterment of humans as beings who need to have relationships with others. Concerted action between sport and tourism will be growing in all directions in the coming years. Large sporting events should be conceived and planned as large tourism events. Sporting activities, in their turn, have been included in the supply of tourism products at numerous tourism destinations, either as specific value added offerings or as principal activities in themselves.

Both sectors are driving forces for the development of new destinations and can make a definite contribution to the recovery of the less developed or less advantaged destinations or regions around the world. For this, the scope of the tourism or sporting activity being planned must be tailored to the potentialities of the destination and the expectations of targeted demand.

There are various levels of expression to both sport and tourism. Sport, ranging from the Olympic Games to neighbourhood sports events. Tourism, ranging from destinations whose economy is based nearly exclusively on tourism earnings to small mountain hostels. In every case, each destination will have an appropriate scale for sport and tourism, and it is that scale that needs to be found and structured through the creation of infrastructure and services that will also benefit and integrate the local populations.

Because of the amount of effort required for the creation of sports infrastructure, it is increasingly necessary for such infrastructure to be designed and managed so that it will also be accessible to the tourists travelling to the destinations where sporting facilities are located.

In any case, one may speak of sports tourism or tourist sports, depending on which facet is more important. What is clear is that, in either case, it will be necessary to understand and integrate how the two sectors operate so as to maximize all the synergies between them. The two are subsystems with differing structures and purposes that need to find and strengthen the points they have in common.

Supply has to be adjusted to fit demand. Supply should also have a clear sense of its priorities and the benefits it seeks to derive from demand. At the present time certain destinations regard a substantial portion of their tourism products as raw materials, to which few distinguishing features are added. This means that the cost of the service can be high, which in turn leads to higher rotation. This nearly always causes the value as perceived by tourists to be low and hence the experience to be not entirely satisfactory. In such cases, prices are usually the chief competitive weapon. In this situation, the alternative open to tourism companies is to focus on a specific type of product and to be the most efficient at offering that product, or to focus on a product line and try to add value so as to achieve market differentiation.

From this perspective, sports tourism travel may be regarded as a direct outcome of changes in consumer buying habits and in the way consumers spend their free time, as a response to human beings' innermost needs and also as an innovation by tourism companies and destinations, which need to reposition themselves and revamp their product and service ranges. Thus, sport adds value to tourism products and makes it possible to bring the enormous growth prospects for this segment to fruition.

At present, it is still hard to discern any clear structure for demand, apart from strictly tourism or strictly sporting interests; and supply, traditionally tourism supply, is only just starting to structure itself according to the needs of sport. It will take great efforts in these two areas in order to properly adjust supply and demand for sports tourism and tourist sports.

Consumer trends for both tourism and sports consumers will map out the path ahead for cooperation between sport and tourism. Consumers are becoming more and more sophisticated and base their demands on the emotional charge they can get from their experiences. Differences among nationalities and different consumer segments need to be taken into account, especially bearing in mind psychographic and sociodemographic characteristics.

Sport and tourism are sources of innovation with respect to the use of free time. Young and adventuresome people invent and discover new forms of tourism and new sporting activities which sometimes remain marginal but at other times can become popularized and turn into mass participation activities.

Consumers are rapidly changing, something we should not lose sight of. The boom in sport and tourism is due in large measure to consumer habits, information, and consumer priorities; these changes can be expected to become more accentuated in the future. Furthermore, tourism and sport were formerly elite activities that have since embraced mass participation, with the resulting expansion in the numbers of people taking part in both types of activity. At the same time, available options as to how to spend free time have grown significantly in recent years, all competing with tourism and sport for the free time of ever more sophisticated, well-educated consumers with more definite notions of what they really want and need.

Cooperation between the public and private sectors is important in both activities. Their interests are complementary, though they need to be structured appropriately. In this cooperation scenario, local populations are once again indispensable for consolidation, planning, and promotion of the activities. For sport, international, national, and local federations and associations play an important role in designing products with tourism components and in promoting closer links to tourism activities. The WTO, regional tourism administrations, and national tourism administrations can provide support and advice in developing products with sports components.

Access to advances and improvements in systems for management and know-how are as important as infrastructure and services. The ability to generate and apply such systems is the very foundation for achieving the expected growth of sports tourism and tourist sports.

Both sport and tourism are complex activities with complicated value chains, in which there are many parties with roles to play. These two sectors are subject to changing trends, often brought about by the use of new technologies, whose full scope may still not be clearly defined. This will end up affecting the nature and the intensity of the relationships between the two.

Sport and tourism are cornerstones of individual well-being and are closely linked to cultural activities. Closer links will give rise to new tourism products, new ways to take part in sporting activities, and even new sports. Informal participation in recreational sports has great potential for growth, and the same holds true for travel, both nationally and internationally. As a result, in the coming years there will emerge new and imaginative means of satisfying a demand that will unquestionably be increasingly sophisticated and demanding. Consequently, there will be a need for professionals with thorough knowledge and experience in both disciplines.

Sport and tourism are activities with an enormous economic impact which are capable of generating economic profits in countless ways. Except in certain countries, statistical limitations affecting these activities make it impossible to predict with any certainty the effects they may be able to generate in the national economies. There is one common aspect: small and medium-size undertakings make up the economic base for both sectors, though the rules of the game are dictated by large conglomerates.

The code of ethics and code of conduct created and systematically applied by both the WTO and the IOC will underpin development of the linkage between the two sectors. The sport-tourism relationship must contain an underlying ethical component visible in all its manifestations.

The mass media play a fundamental role in the two sectors and can build up or undo athletes and destinations with ease. Since both are activities carried out en masse, it is essential for the media to act according to well-defined codes of ethics designed to limit their influence and foster the image of tourism destinations and sports activities according to their merits and their huge impact on present-day society.

It will be possible to achieve all this only if permanent bridges for communications, information, and the performance of joint activities can be built between both sectors at the political, business, and academic levels. This is the great challenge for the future.

Main results of the Conference

The first World Conference on Sport and Tourism will doubtless be a milestone in the relationship between these two sectors, two sectors that were unconnected until a relatively short while ago.

Tourism is the world's leading industry¹, without taking into account domestic tourism in the various countries, which surpasses the figures for international tourism. Tourism is also a truly global industry in itself insofar as it exists even in the most distant corners of the earth and creates links between all the peoples of the world.

Sport is the number-one industry in the leisure sector. Although the economic weight of the different subsectors of sport is difficult to quantify, there is no doubt that the influence of professional sports activity now ranks as a global phenomenon, particularly in the light of the role played by the media and largely as a result of the enormous media impact generated by major sporting events. Athletes of both sexes have become heroes/heroines and role models in terms of dress, behaviour, opinions, and even outlook and attitudes to life in general. Amateur and pleasure sports have become a means of escaping the stress that characterizes our society, one in which individuals need some kind of release mechanism to enable them to become themselves again, for a while at least.

The importance of the Conference relied on the fact that it represented an opportunity to discuss, for the first time ever, the relationship between sport and tourism from an integral perspective, uniting around the same table experts from both fields and various disciplines, with a common goal: to understand and strengthen relations between the two industries, at all levels – economic, social, business, academic and training.

The Olympic Games are clearly the biggest sporting event in the world. At the same time, and as demonstrated by the Barcelona and Sydney Games, they are also a major tourism event and have the potential to consolidate or weaken, as the case may be, the host city as a leading tourism destination. The realization of this potential mainly depends on the way brand image and tourism potential are managed once the Games are over.

Other major sporting events, such as the World Athletics Championships and the Tour de France, require a huge effort on the part of the host city or country concerned in terms of image projection; the chief rewards generated by this effort undoubtedly spring from the number of tourists these destinations will be capable of attracting in the years following the

¹ WTO: Tourism Market Trends, 2000 Edition. This publication quantifies international tourism all over the world and in the different regions, subregions and countries.

event in question. And there are thousands of small and medium-scale sporting events that serve to stimulate knowledge of the city or region responsible for organizing them.

Sport is also beginning to emerge as a key component of tourism supply. Big tourism destinations are developing interesting tourism product concepts revolving around pleasure sports. These concepts enable destinations to stand out from their competitors and therefore increase their competitive edge in the international arena, attracting consumers who are keen on coming into contact with nature, getting to know other people and enjoying more healthy and interactive holidays.

Professional athletes have become an increasingly important target market for tourism destinations. These destinations are investing in the construction of attractive and well-equipped facilities and installations, the design and financing of which are occasionally partly shouldered by the teams or associations that will subsequently become their main clients and use them for training sessions, local tournaments or other sporting events, generally in a pleasant climate. And this market is starting to represent a good business opportunity for receptive travel agencies and tour operators, which are often responsible for aggregating supply and ensuring the far more efficient distribution of the sports tourism package.

Sport and tourism share common goals: understanding other cultures and lifestyles, contributing to the promotion and consolidation of peace among nations, and to forging closer relations between people of different cultures. From this perspective, two complementary worlds have been united, both of which seek to promote individuals as people that need to interact with others.

But they tackle this task in different ways. Sport is based on a competitive environment where performance and results are the key, but where friendship between rivals is very commonplace; tourism is based on selling sensations and experiences, the key being getting to know new people and sharing new experiences. Sports tourism is based on the practice of a sporting activity in a pleasant environment, but not necessarily in a competitive context; levels of physical fitness, results or classifications are immaterial. Sports tourism combines the opportunity to take part in a sporting activity with a wide range of other values such as contact with nature, stunning scenery and landscapes, exceptionally good food, interesting cultures and people, etc.

In this context, it is worth highlighting some of the points that came to the fore during the Conference:

1. The relationship between sport and tourism will inevitably grow in the years to come, and at all levels. Major sporting events will necessarily be major tourism events and should be planned as such; sport, both for pleasure and at professional level, already forms an intrinsic element of the products supplied by numerous destinations and is an undeniable source of value added vis-à-vis the tourism product.
2. Sport and tourism can have a major impact on the development of new destinations and the recovery of destinations or regions that have either slumped or are out of phase; in this respect, it is important to highlight that initiatives of this type must always be tackled from a realistic perspective. Whatever the case, the dimension of the activity, whether tourism or sport, must be in sync with the destination's potential, both from the standpoint of infrastructure and from the standpoint of sport and tourism facilities and installations. Various aspects must be taken into consideration in this regard:

- a. Demand. In Germany, the world's biggest generating market in proportion with its population, sports-oriented trips represent 55% of total travel, a figure that falls to 52% in the case of the Dutch and 23% in the case of the French. From a marketing perspective, it is important to highlight the multiple consumer segments that exist, some of which are chiefly defined by demographic features and others on the basis of the target sport and its location. In this sense, the matching of supply and demand requires sound planning in both directions, and the target segment, its motivations and the product that needs to be launched must be very clearly defined from the outset.
 - b. Supply. Not all destinations and countries can organize Olympic Games and world championships, and thus become destinations linked with major sporting events of all types. But regional and national events also exist, as does a tourism market that is eager for new destinations and new experiences, which emerging tourism destinations can doubtless satisfy. In this respect, the suitable development of tourism and sports products, both in terms of installations, facilities and activities, must be planned and controlled.
3. Major sporting events provide destinations with an unbeatable opportunity to project their tourism image. If the efforts made to this end are to be consolidated and capitalized upon, suitable planning is required well in advance of the actual staging of the event and must be followed up by consistent and durable management. The job must be handled properly if the event is to continue generating spin-offs in the long term.
 4. In many cases, infrastructure is often the biggest hurdle, in terms of both sporting events and tourism development. Steps must be taken to create new forms of planning and management that are conducive to balanced development and facilitate the access of tourists to existing sports facilities. In many cases, it is the public administrations that are chiefly responsible for creating and managing infrastructure, a task that must be underpinned by a clear-cut development model. From this perspective, the proper planning of the use of the facilities generated by a major sporting event is one of the biggest challenges faced by public institutions and private enterprises, both tourism and non-tourism oriented.
 5. Cooperation and the forging of closer ties between public and private initiative is a must. Their interests do not diverge; indeed they are complementary, but they must be properly structured. It is in this context of cooperation that local populations are all-important in terms of consolidating activities in the long term. In the case of sport, international, national and local federations and associations have a key role to play in terms of strengthening relations and designing products with a tourism component. In the case of tourism, WTO and national and regional organizations can provide support and guidance in terms of developing products with a sports component.
 6. Sport and tourism are both complex activities, with complicated value chains, in which many parties have a role to play and which involve the movement of large amounts of money. Consolidation and integration are becoming increasingly commonplace in both sectors, and mutual knowledge and understanding of the interests involved and the potential links between the two industries are likely to give rise to unpredictable developments, to alliances and associations that perhaps seem unlikely at this point in time. Changes, often triggered by technology, are taking place in both sectors, and it is not always clear where these changes will lead. They will doubtless end up influencing the shape and intensity of relations between sport and tourism.

7. Sport and tourism are activities with an enormous economic magnitude with the potential to generate an endless range of economic spin-offs. Small and medium enterprises form the economic foundation of both sectors, even though it is the big consortia that lay down the rules of the game.
8. Sport and tourism are the source of new forms of free-time use. The younger and more daring age groups invent and discover new forms of tourism and new sports, some of which turn out to be passing fads while others take hold and become mass phenomena.
9. In this context, we should not lose sight of the fact that consumers are changing, and swiftly. The boom of sport and tourism can largely be ascribed to changes in consumer habits, the information available to consumers and their priorities; these changes will doubtless be accentuated in the future. On the other hand, tourism and sport, once elitist activities, are now mass activities, hence the growing number of adherents. Likewise, the alternatives for free-time use have multiplied substantially in recent years, and they are all competing with tourism and sport to attract the more sophisticated and more educated consumers, who are very clear about what they require and whose principal pursuit is well-being, at all levels.
10. Sport and tourism form the basis of individual well-being, from which culture cannot be divorced. An enhanced understanding of both areas will generate new tourism products, new opportunities for taking part in sporting activities and even new sports. Casual and leisure sports have huge growth potential; the same holds true for travel, both national and international. This will trigger new and innovative forms of managing demand, which will in turn become increasingly sophisticated. Against this backdrop, a new breed of professionals will doubtless be required, professionals with an in-depth knowledge and understanding of both disciplines. In this context, it is also worth noting that interesting developments, both professional and academic, are already taking place in the field of interdisciplinary studies and programmes.
11. Both tourism and sport involve managing large-scale human movements. This requires the development of a broad range of infrastructures and facilities, the mere existence of which will modify the scenario and environment in which these activities take place. As Peter Keller said, "to a certain extent, they are not a plague in themselves, but they do mirror the society to which they belong, which is not always capable of controlling what it generates"². Assuming that these activities will have an impact, steps must be taken to develop criteria related to the sustainability and environmental protection of sport and tourism destinations. These criteria must be the sine qua non for developing and managing both sporting events and tourism destinations. Overriding consideration must be given to local populations and cultures, which must be involved in the entire process and share in the spin-offs generated by these activities.
12. Individual behaviour and education are the mainstay of the harmonious and balanced development of tourism destinations and sports activities. The individual is the cornerstone of these destinations and activities. Measures designed to raise the awareness of these individuals, coupled with the implementation of public policies and the backing of NGOs and private companies, is likely to result in greater respect for nature and the environment.

² Paper presented by Peter Keller at the First World Conference on Sport and Tourism, Barcelona, Spain, 2001.

13. Ensuring compliance with the ethical codes and codes of conduct created by both WTO and the IOC, and creating tourism-sport quality labels and brands constitute one of the biggest challenges the two sectors must meet in coming years.
14. Sports phenomena are essentially fuelled by the media, who are likely to play an increasingly important role in terms of fuelling tourism phenomena with the advent of digital technologies. At the same time, the media have a major moral obligation insofar as they can twist the facts to suit their interests and often warp the image of a sports activity or tourism destination.
15. Africa is shaping up as the continent of the future, as both a sports and tourism destination. This continent has not hitherto hosted any large-scale sporting events, and still offers few big tourism destinations. If this potential is to be realized, massive infrastructure developments are required, in terms of both communications and sport and tourism, in which respect there is huge scope for cooperation with the rest of the world.
16. There is a chronic shortage of statistics and information in this branch of tourism. In many cases, sports activity lacks reliable statistics and the point where tourism and leisure meet lacks frames of reference to enable any reasonable quantification of supply and demand. The real dimension of the economic variables involved and the movements of people are largely unknown, and the information that does exist is too aggregate, hence its limited usefulness. Remedying this situation is doubtless another of the major challenges that lie ahead.

There is no doubt that one of the great achievements of the World Conference on Sport and Tourism has been its ability to make it clear that these two separate worlds have a great deal in common. We must therefore rise to the challenge of building bridges and creating permanent links between them.

THE RELATIONSHIP BETWEEN SPORT AND TOURISM

1.- Background

As explained earlier on, tourism and sport have much in common, essentially the fact that they share a common consumer who, in many respects, is often seeking the same from both activities: self-fulfilment, and the chance to get to know other people and enjoy new experiences. In the case of sport, the focus is clearly more performance oriented, although changes in recent years appear to indicate that sport is also acquiring a "play" dimension, one of mere enjoyment irrespective of performance or results. Tourism, on the other hand, has always been an activity oriented towards providing consumers with pleasure and enjoyment, new experiences and lasting memories.

From this perspective, then, the aims of the two activities differ, as do their sectoral and economic structures. Notwithstanding these differences, sport and tourism have increasingly more aspects in common.

Sport has become a major component of the tourism product. Indeed, the marketing and continued survival of a great many tourism destinations and products hinges on the practice of sports activities.

Tourism is also an increasingly important component of a great many large and small sporting events. The Olympic Games provides a vast showcase for tourism. Many sporting events, world, national and even regional championships, and a great many other competitions, such as leagues and cups, are gradually acquiring a tourism dimension targeting spectators at these events.

It therefore makes sense to associate the two activities insofar as they are, in many respects, complementary.

What is not always clear, however, is whether we are discussing tourism sport or sports tourism.

Studies of the relationship that exists between both sectors have hitherto been very sporadic. Even the World Conference itself has analysed the relationship between sport and tourism on the basis of major sporting events rather than on the basis of the day-to-day relationship between the two disciplines.

This situation is largely due to the fact that few interfaces exist between the two sectors. Changes have nonetheless been taking place in recent years with the creation of an increasing number of university courses focusing on sports tourism and tourism sport, particularly in the Anglo-Saxon countries. The Sports Tourism International Council has been created along with various other organizations that specifically deal with analysing relations between tourism and sport.

However, the business worlds of the two sectors are almost completely separate. Tourism enterprises sell sport as a recreational activity, rarely as an organized activity, and they rarely employ sports professionals to manage this component. Sports enterprises regard the tourism component of travel merely as a necessary evil.

This situation should gradually change, particularly on account of the fact that some tourism initiatives are based on the practice of sport, and that some tourism destinations are developing sports infrastructures with the aim of attracting not only sports enthusiasts but also professional teams that are seeking an agreeable climate and quality facilities for training or for visits, far from the intense competitive and media pressure they are subject to in their places of origin.

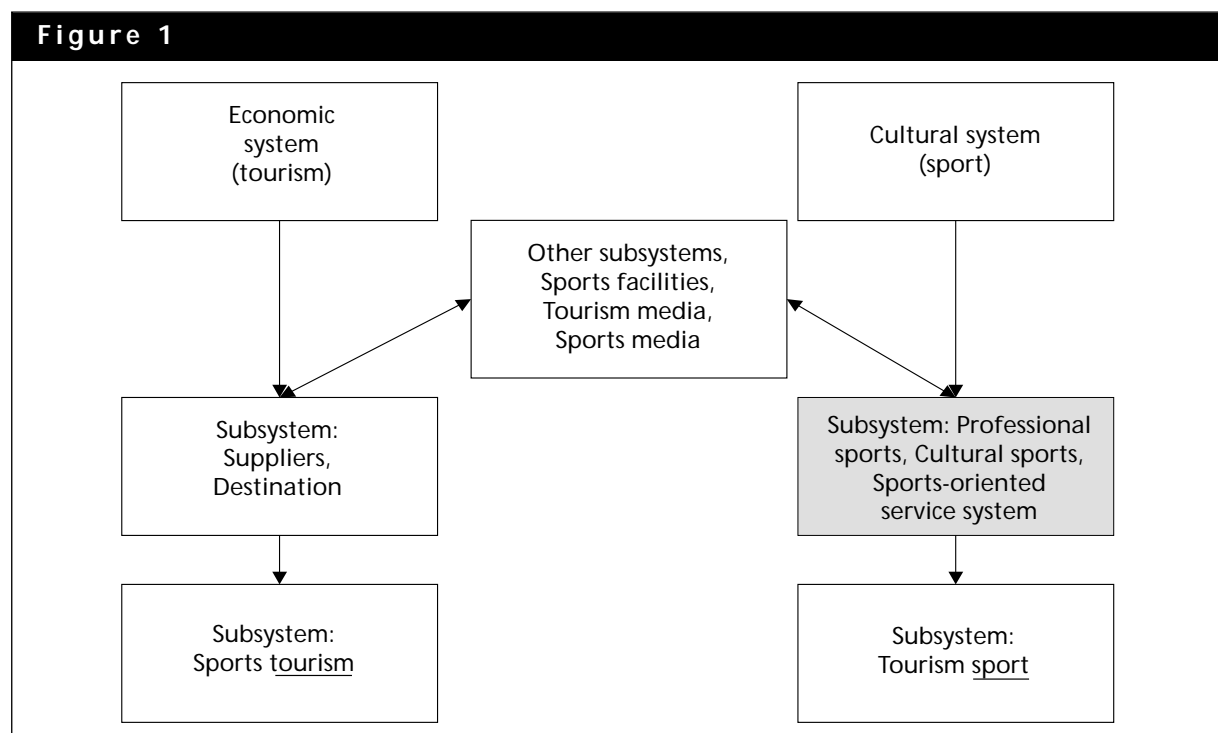
When it comes to appraising the real relationship that exists between both disciplines, it should be noted that the little contact that exists between them obviously generates two radically opposed viewpoints – the tourism-oriented viewpoint and the sports-oriented viewpoint. Each mirrors the philosophy of the sector in question and its specific interests. From a tourism standpoint, the most important variables are the affluence of the public and the turnover of sector enterprises. For these companies, business generated by sport is no different to business generated by any other activity.

The tourism sector's attitude towards sports tourism is shaped by the additional revenues it is capable of generating, both from the actual practice of the sport in question, but above all from expenditure related with accommodation, consumption, shopping, positive notoriety, etc. This gives rise to two tourism scenarios: one based on elitist sports practised by relatively few people, generally mountain sports in idyllic surroundings, which require unpretentious

infrastructures and are geared to generating truly unique experiences. The other scenario is one of sports for the masses, with a large volume of activity, a broad base of adherents and a large number of enthusiasts.

From a sports standpoint, activity and performance are the two overriding factors. In this sense, the term "sports tourism" is not yet firmly rooted. Attention tends to focus on finding places that are suitable for practising a specific sport and that are equipped with suitable facilities, places that can host concentrations of athletes, although attention to the complementary leisure component is increasing. In this case, tourist attractions have relatively little weight in terms of meeting the ultimate aim, which is the practice of sports. These two perspectives generate two systems of reference stemming from a common reality that needs to be harmonized and structured. Figure 1 shows the conceptual relationship between sport and tourism.

Although each sector of activity is already substantial, their interaction engenders complementary perspectives and a common area in terms of the equipment, infrastructure and activities that must be coordinated.



Source: Sean Gammon and Tom Robinson. "Sport & Tourism. A conceptual framework". *Journal of Sport Tourism*, Vol. 4, n° 3, 1997.

To bring the relationship between the two sectors into focus, it is important to realize that the difference between tourism sport and sports tourism springs from the motivation for the trip. In the case of tourism sport, sport is the motivating factor, whereas in the case of sports tourism, the primary factor is the tourism experience. Adherents of tourism sport are chiefly individuals or groups that participate, actively or passively, in competitive or recreational sports outside their habitual place of residence. Adherents of sports tourism are individuals or groups whose active or passive participation in a competitive or pleasure sport can be classified as a secondary activity. In both cases, a distinction can be made between "soft" and "hard" adherents, depending on the level of dedication, effort and competitiveness they devote to the activities practised.

2.- STRUCTURE OF DEMAND

Demand linked with tourism-sport as a joint activity can be classified into seven separate groups which can be differentiated on the basis of their degree of involvement in the sports activity in question, and the importance of the tourism component of this activity:

- Top-level athletes
- Second-level athletes
- Youth groups
- Sports enthusiasts and amateurs
- Tourists who want to practice sport when they travel
- Tourists who practice sport on a casual basis
- Spectators

A distinction should be made between sport practiced on an individual basis and sport practiced as a group activity.

Each category has specific requirements relative to the practice of sport per se and the practice of sport in the tourism destination. The most important characteristics of each group are listed below, the focus being on the practice of sport linked with activity in a tourism destination.

2.1.- Top-level athletes

These are the sporting elite. They are very few; according to some estimates, they represent less than 8% of all athletes. Their requirements are very clear:

- Top-level sports facilities, fully equipped for sports and complementary activities.
- Suitable backup facilities, particularly medical services.
- Importance of diet and accessory services.
- Need for closed and all-inclusive packages (accommodation, transport, sports facilities, diet, après-sport, laundry service, etc.).
- Four-star accommodation, or a higher category.
- Climate is an important factor; minimum guarantees are required in this respect.
- Amusements and tourist attractions are incidental.

2.2.- Second-level athletes

This category encompasses all other competitive athletes. They require:

- Good level sports facilities, properly equipped for sports and complementary activities. They are as demanding as top-level athletes.
- Preference for backup facilities such as medical services, gym areas, etc.
- Importance of diet and accessory services.
- Preference for closed and all-inclusive packages (accommodation, transport, sports facilities, diet, après-sport, laundry service, etc.).
- Decent two- or three-star accommodation.
- Climate is not the main determining factor, but minimum guarantees are demanded.
- Amusements and tourist attractions are incidental.

2.3.- Youth groups

Today's promising young athletes will become the cornerstone of tomorrow's competitive world of sport, and their requirements are conditioned by their level of involvement with the sport in question. In recent years, they have become an important target market insofar as the clubs to which they belong are increasing their purchasing power and also in the light of the fact that travel is now considered as both a professional and a leisure activity.

Their requirements vary considerably with regard to the two previous groups.

- Decent sports facilities, equipped for the practice of sport. Complementary facilities are not strictly necessary but are appreciated.
- Backup facilities are not necessary but can represent a valid sales argument.
- Relative importance of diet and accessory services.
- Preference for closed and all-inclusive packages (accommodation, transport, sports facilities, diet, etc.).
- Decent accommodation.
- Climate can be an important factor.
- Amusements and tourist attractions can influence decision-making.

2.4.- Sports enthusiasts and amateurs

Sports enthusiasts and amateurs form a very heterogeneous group that does not lend itself to generalizations. This doubtless constitutes the biggest group of those hitherto considered under the heading "sports tourism", with strong components. There is still a tendency to classify this group under the heading "tourism sport", which applies to the three previous groups, although the importance of the tourism motivation factor is considered to be growing.

To some extent, the basic requirements and characteristics that feature in this case broadly depend on the purchasing power of the group in question. Generally speaking, they break down as follows:

- Sports facilities of a relatively high standard and equipped for the practice of sport. In some cases, there is demand for access to professional facilities, even if these are expensive.
- Complementary facilities are appreciated.
- Backup facilities represent a valid sales argument.
- Diet is relatively important, as are accessory services, all of which depend on the characteristics of the group in question.
- Closed and all-inclusive packages are preferred.
- Decent accommodation is sought in the two- to five-star range, depending on the type of group.
- Climate can be an important –even decisive– factor
- Amusement and tourist attractions are important in terms of the choice of destination

2.5.- Tourists who want to practice sport when they travel

The main purpose of trip for this group is tourism and the opportunity to practice a sports activity. This group doubtless come under the "sports tourism" heading, with strong and soft components.

In this group, the accent is on adventure sport and group sports (cycling). Requirements tend to differ considerably from those of the aforementioned groups.

- Well-equipped facilities for practising sport. Complementary facilities are not required.
- Backup facilities represent a valid sales argument.
- Freedom to choose diet and accessory services.
- Closed and all-inclusive packages for the practice of sport.
- Two- or three-star, decent accommodation.
- Climate is an overriding factor.
- Amusements and tourist attractions influence the choice of destination.

2.6.- Tourists who practice sport on a casual basis

This group includes the vast majority of tourists who, at one stage of their stay in the place of destination, have the opportunity to practice sport, irrespective of whether they do or not. The sports in question are closely linked with the location of the destination –sea or mountain– and with the products offered by the place of accommodation, which is generally the point of sale as far as sporting activities are concerned. If this possibility does not exist, tourists who practice sport on a casual basis are unlikely to do so.

Their requirements are far more tourism than sports oriented.

- They require pleasant sports facilities. In this case, complementary facilities are not necessary beyond those required to comply with minimum safety standards, which are applicable to all the activities conducted during the visit.
- Backup facilities do not represent any additional advantage.
- The package is based on tourism, not on the opportunity to practise sport, which would be classified as a casual activity.
- Accommodation facilities vary depending on the level of the holiday.
- Climate and location are clearly the most overriding factors.
- Amusements and tourist attractions are all-important in terms of the choice of destination.

2.7.- Spectators

Active participation in a sporting activity is not the aim of this group, which simply wants to watch a sporting event and is in many cases prepared to go to great lengths to avail itself of this opportunity. Tourism is only now becoming an additional key motivation. Spectators can be contrasted with what, at the other end of the scale, are pure tourists for whom sport does not in principle have any appeal.

Spectators rarely represent an important tourism component, except in the case of major sporting events. They do, on the other hand, represent a large source of revenue for tourism enterprises.

3.- STRUCTURE OF SUPPLY

Two different, albeit complementary, structure categories can be established, one of which will be determined by the type of sports activity available and the other by the sports tourism infrastructure that exists.

3.1- Activity based ³

It is likely that products structured for sport activities with a high tourism component, or tourism activities with a high sports component, will underpin the creation of a new type of specialized enterprise. Its main value-added will be its capacity to provide specific know-how relative to both sectors, combining experience in singular initiatives designed to strengthen, in a coordinated manner, both product components.

From this perspective, a scale can be established running from more sports-oriented to more tourism-oriented products, encompassing all the following activities:

a) Sporting events

This heading encompasses major sporting events, sport festivals, both specific and general, and specific sports programmes and activities.

Depending on the size of the event, and therefore the complexity of its organization, two types of events can be identified:

- Major events: Olympic Games, World Athletics Championship, Football World Cup, etc.
- Small-scale events: national or regional championships, competitions, sports contests, etc.

b) Tourism centres

This heading encompasses areas that have been specifically designed to attract sport tourists, including enclosed areas such as France's Club Méditerranée sites, and other centres that are more open, where the product on sale encompasses the entire destination, e.g. Cancun and St. Moritz.

c) Attractions

This is a very heterogeneous group. It includes museums, national parks, halls of fame, historic sites, theme parks and fun fairs, etc.

Some of these installations are specifically designed as visitor attractions that revolve around the world of sport, whereas in others sport is simply an additional attraction that enhances the appeal of the visit.

³ This section has been prepared on the basis of the general classification provided by the Sports Tourism International Council.

d) Tours

Two types of tours can be distinguished:

- Tours organized for spectators wishing to attend specific sporting events.
- Tours for tourists who want to practice sport in a specific destination.

The structure of the second category can be divided into three categories:

- Tours based on structured visits, for sport teams, professionals or amateurs, involving pre-scheduled activities and programmes.
- Those in which stays are more casual, generally for tourists who want to combine a holiday with the practice of a sporting activity.
- Sporadic activities, conducted on a purely casual basis relating to a given moment or situation.

e) Cruises

This is a new type of tourism linking the practice of sport with the cruise as the tourism attraction.

3.2.- Infrastructure-based

This classification encompasses different types of infrastructure that can be used for the practice of a sport linked with a tourism activity. In this case, ownership of the facilities is a key factor in terms of determining the type of practice it can be used for.

a) Publicly-owned sports facilities

These can be:

- For general use, such as sports complexes or municipal stadiums, and which can be open to tourists wishing to practise sport. Conflicts over occupation tend to arise between local populations and the local and visiting sports teams that are also entitled to use these facilities.
- Specifically designed for sport tourism, which is the priority use, as opposed to any other types of complementary uses.

b) Privately-owned sports facilities

- Owned by sport clubs, such as football or tennis clubs. As a result of the decrease in club-based sport and the structured practice of sport, tourism sport now represents an additional source of income for certain institutions of this type.
- Owned by tourism centres, as is the case of the Club Méditerranée sites and large hotel complexes that have created sports infrastructures to cater for both professional and amateur athletes and sport tourists, in top-quality facilities in exceptional tourism areas. The creation of facilities of this type is really beginning to take off on the Mediterranean coast.

c) Professional sports facilities

High performance centres and similar facilities almost exclusively devoted to the training of professional athletes; widespread all over Europe.

Professional centres for athletes, clubs of professional athletes in which tomorrow's top professionals are trained; very widespread in the United States.

4.- MATCHING SUPPLY AND DEMAND

4.1.- The frame of reference

Markets are created on the basis of their ability to match supply and demand. In this particular case, we are dealing with the perspective of tourism sport or sports tourism and can therefore use a simple matrix system to generate a multitude of potential markets that have hitherto been barely tapped.

The matrix shown in Figure 2, which crosses supply with demand, shows that some activities specifically target specific audiences. The classification used, which is more elaborate than the classification initially devised by the Sports Tourism International Council, has been designed to provide us with a tool that is useful for analysing demand, its requirements and, as the case may be, for generating specific products, both tourism and sport oriented.

Figure 2

	Top-level athletes	Second-level athletes	Youth groups	Amateur athletes	Spectators	Sports tourists	Tourists who practice sport on a casual basis
Major events							
Small events							
Structured stays							
Tours designed to coincide with major events							
Casual visits							
Sporadic activities							
Tourism centres							
Tourist attractions							

Source: Angel Díaz.

Each of the cells in this matrix represents a business opportunity that must be explored and analysed.

Some are already highly consolidated, such as major events for top-level athletes, the most representative sample of which is doubtless the Olympic Games. At the other end of the scale, we have centres for tourists for whom sport is far from being the main purpose of trip, this being the case of the many beach hotels all over the world.

Many other cells should begin to fill up as tourism and sports practices become more extensive and the number of joint users multiplies, thus creating interesting business opportunities. Some opportunities are already being exploited, such as stays structured for top- and second-level athletes, or casual stays for amateur athletes and, from the standpoint of tourism products, these are starting to be projected as interesting business activities.

If this enormous potential is to be realized and consolidated, steps must be taken to analyse in depth the types of activities that are likely to be developed in each case, their target audiences and the type of facilities that are available and indispensable. In this respect, a useful tool would be the abovementioned classification of infrastructures that can be used for sports.

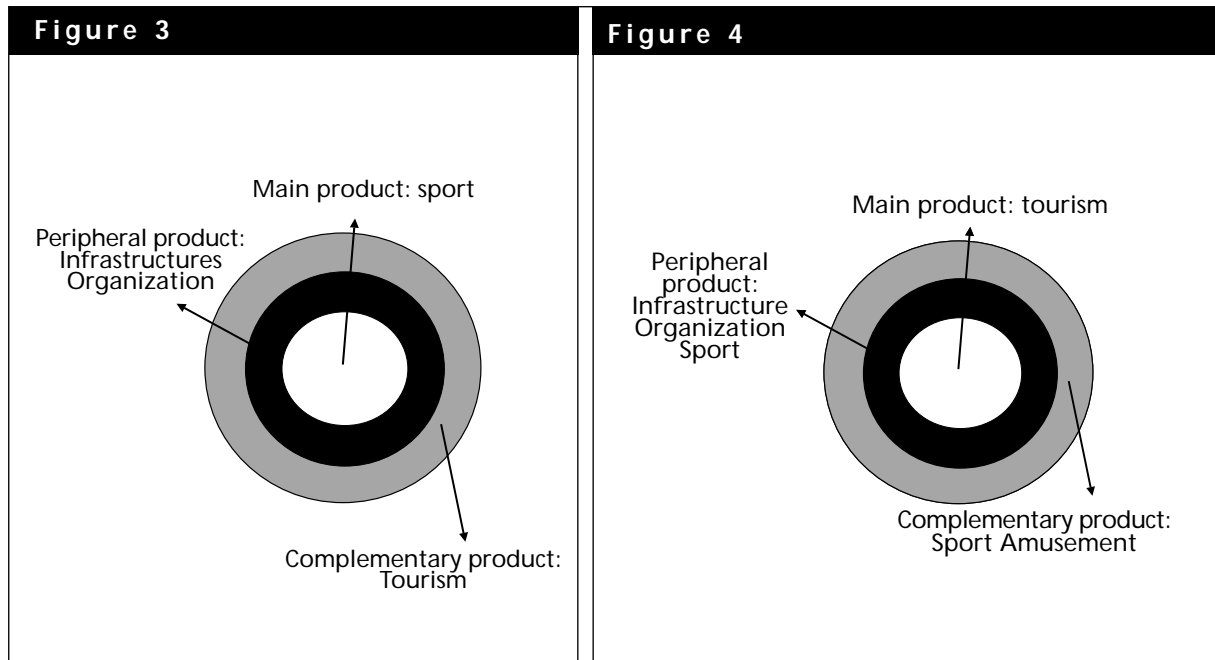
Account should also be taken of development programme schedules, which must be feasible and complied with, both in terms of building sports infrastructure and the time required to consolidate a sports tourism destination as such, in the mind of the end user and in the tourism product marketing chain.

Many of the activities that can be considered from a strictly sport-oriented standpoint are one-off events for the destination in question and therefore require extremely careful planning and, in many cases, extremely careful infrastructure development. More often than not, very limited use is made of these facilities – and the underlying know-how – after the event. Remedying this situation from the standpoint of the sport component doubtless represents a challenge, one that can be met by exploiting the tourism component.

Irrespective of whether we are dealing with professional or amateur sport, or sport practiced on a casual basis, it is clear that the importance of the tourism component is growing by the day. Each cell in the matrix must therefore always be considered from two complementary perspectives, sport and tourism, the aim being to come up with the best sport-tourism mix for each case.

But the relationship is not yet symmetrical. As shown in Figures 3 and 4, tourism has a marginal role with respect to sport. When sport features as the main product, tourism plays a purely complementary role. When tourism is the main product, sport also plays a complementary role, and in some cases also forms part of the peripheral product, this being taken to mean the product that complements the main product, eventually becoming a key component of it. This can be contrasted with what is referred to as the complementary product, which represents an extra consumption opportunity linked with the previously adopted decision to buy the main product.

With the passing of time, it is highly likely that the relationship between the two sectors will change and opportunities to strengthen ties and create a balance between the two will doubtless multiply. There is no doubt that the relationship between sport and tourism is not a static one.



Source: A. Díaz.

4.2.- Factors that determine the development of the relationship between tourism and sport

The relationship between tourism and sport has already proved to be complex and elaborate. Both sectors clearly have a promising future. Both have the ability to meet the requirements of modern man and both are fuelled by powerful economic machines operating on a global scale. The combination of the two sectors nonetheless represents new challenges and raises a great many questions.

In the case of tourism sport, which has become increasingly professionalized and structured, international federations and even the International Olympic Committee itself must take account of the growing importance of the tourism component. The same holds true for professional sport, which could not be sustained without the vast number of people who follow it en masse, either on television or in the stadium. But attention is beginning to focus on the surroundings, and the added appeal of tourism is already an important component of the main product, i.e. the sporting event.

Needless to say, this is also an important component of sports tourism, where the principal motivation is tourism-oriented, the sports activity in question therefore tending to be one that attracts amateurs and enthusiasts, as opposed to professional sport.

In both cases, a great many factors can influence the very existence of the relationship and the direction it is likely to take.

a) Relationship between tourism destinations and the practice of sport

In this case, various scenarios can be envisaged, and in each one the key factors are likely to differ.

One scenario is the tourism destination that wants to specialize, at least in part, in the organization –hosting might be a more appropriate word– of major sporting events, all professional. This holds true for Monte Carlo and is likely to become the goal of many other cities such as Sydney and Singapore.

In these cases, the critical success factors are clearly identified, time being the first and foremost. A destination needs time to consolidate itself as a tourism destination that hosts major sporting events. From this perspective, Monte Carlo is probably a unique example, although we should not forget that its trajectory spans 130 years.

Other cities intend to follow suit. Singapore is one example. According to Angela Tam⁴, the critical success factors required to bring an initiative of this type to a successful conclusion are as follows:

- Disposing of suitable infrastructure and facilities. In the case of professional sport, this is by far the most important factor.
- Private sponsorship, which is indispensable to obtain the vast amount of funds and the positive notoriety required to attract events.
- Media
- Political determination, also indispensable to attract events and develop suitable infrastructure and facilities, but also to maintain the destination within the international sport circuit.
- Regional cooperation, geared to enabling the destination to absorb the effects generated by major sporting events at all levels.
- Other requirements:
 - Local national champions, or successful local teams
 - A critical mass of athletes and spectators
 - Development of a sport-oriented culture
 - Appointment of fervent sports enthusiasts to posts of responsibility
 - Constructive commitments between all the parties involved
 - Inter-disciplinary committees with a global vision and specific responsibility for developing sports tourism

Another scenario is the tourism destination that wishes to specialize in what has hitherto been referred to as “sports tourism”, the possibility of offering sports activities to complement tourism per se.

In this case, the critical success factors are fairly similar, albeit with the addition of one important factor, climate, which is crucial both for tourists anxious to practice sport and for professionals wishing to travel, and is therefore a key element in terms of choosing the destination.

⁴ Angela Tam, “Critical Success Factors in Sports Tourism Development: their application to Singapore”, *Journal of Sports Tourism*, Vol. 5, n° 1, 1998.

The existence of quality infrastructures and facilities is obviously an indispensable requirement, albeit not enough in itself.

Another important factor is the existence of an entrepreneurial system that can meet requirements, firstly in terms of the practice of sporting activities and, secondly, in terms of the complementary products they generate: gastronomy, entertainment, amusements, etc. Creating this kind of synergy in time and space is a difficult task insofar as it often requires a critical mass that prevents under-sized destinations from tackling ambitious initiatives that their environment or facilities could make feasible.

Another critical success factor is the existence of personnel with the required knowledge of the practice of sport and the tourism business. In the field of sport, coaches, trainers, doctors, physiotherapists, masseurs, etc. are required to provide assistance should the need arise; in the case of tourism, the accent would be on specialists (designers, planners, etc.) capable of turning sport into a tourism activity and who can guarantee the safe practice of sport.

Last but not least, there is the case of destinations with just a handful of facilities or enterprises that want to devote themselves to this activity. This would apply to mature tourism centres or destinations where there is a company focusing on the practice of sport in the context of tourism.

In this case, it is extremely important to focus on the management concept applied to the activity in question, along with the target audience, the time of year, the activities that will be offered, the channels that will be used to this end and the results the activity is expected to generate.

ANALYSIS OF THE TOURISM AND SPORTS CONSUMER

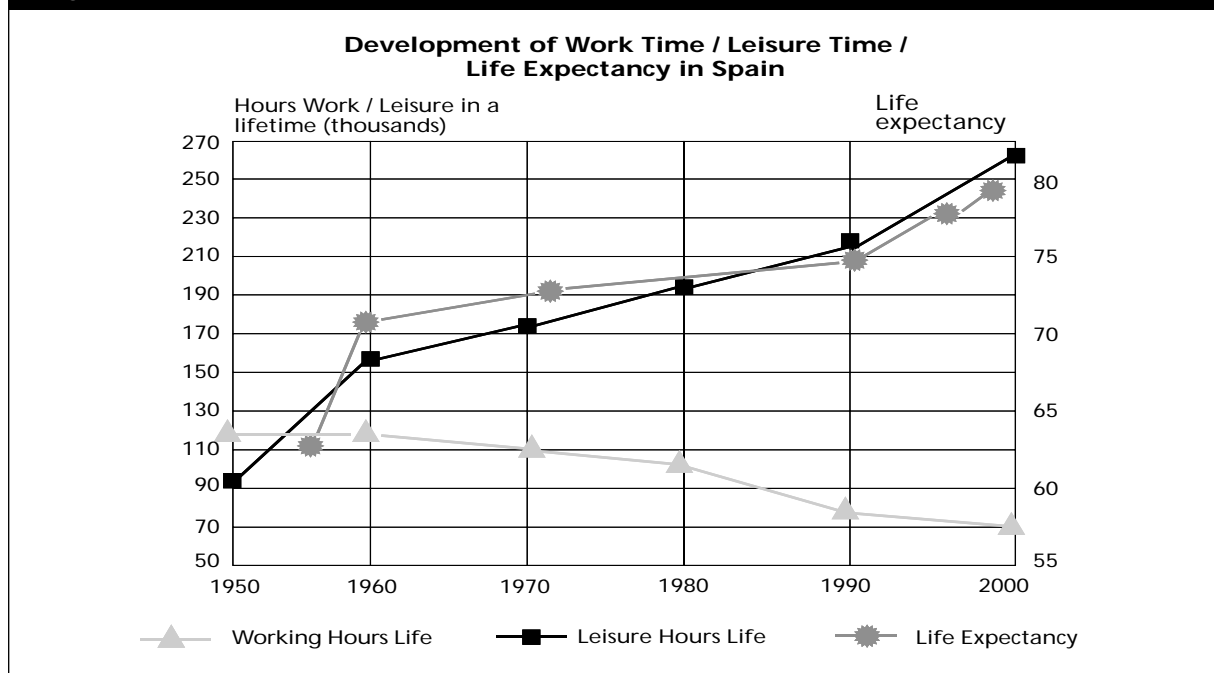
This chapter analyses patterns of free-time use and the factors that determine how end consumers use their free time, all of which are all-important in terms of understanding the sports tourism phenomenon.

The following information can provide the basis for subsequent examinations of the direction the sports tourism sector is taking, the variables that come into play, and the grounds that motivate end consumers and pave the way for the development of new activities and new products and services based on a market segment that will see substantial growth in coming years.

1.- THE FREE-TIME CONSUMER

Various factors determine the perception of today's tourism and leisure consumers and their behaviour. These factors must be examined in some detail in order to understand the growth in both tourism activity and sports activity.

The first factor is linked with free time availability.

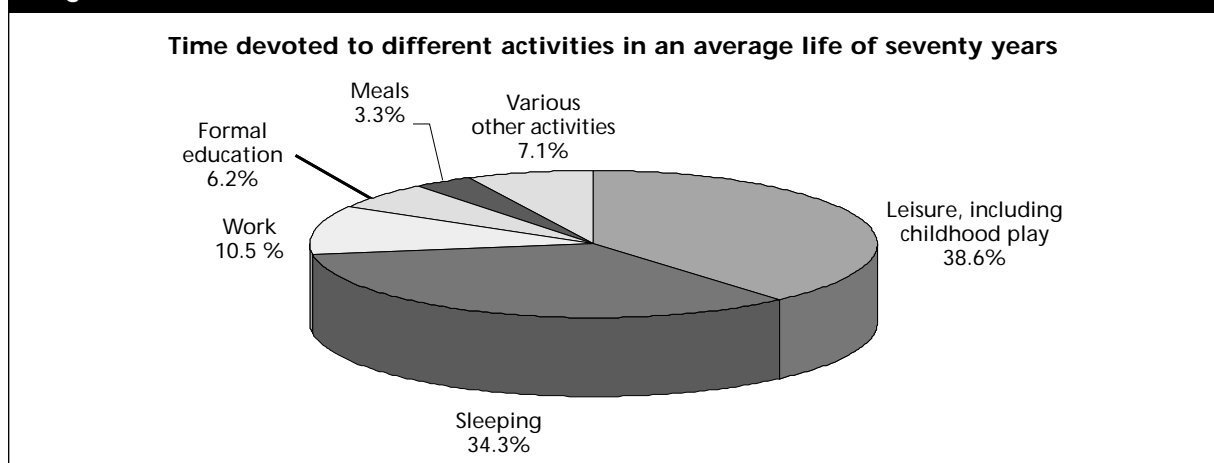
Figure 5

Source: Josep Francesc Valls. ESADE-CEDIT, 1999

By way of example, Figure 5 shows how free-time availability has increased in Spain from the 1950s up to the present, a model that can also be applied to other countries.

This is due not only to the reduction in the number of working hours –the 35-hour working week is currently being established all over Europe– but also to longer life expectancy and better quality of life. A direct result of these factors is the increase in the percentage of free time. And these hours of free time have to be filled somehow. Tourism and sport are clearly two valid options in this respect, as are all types of activities linked with leisure and recreation.

The most important activity in our lives, after sleeping, is leisure, including the time devoted to play during childhood.

Figure 6

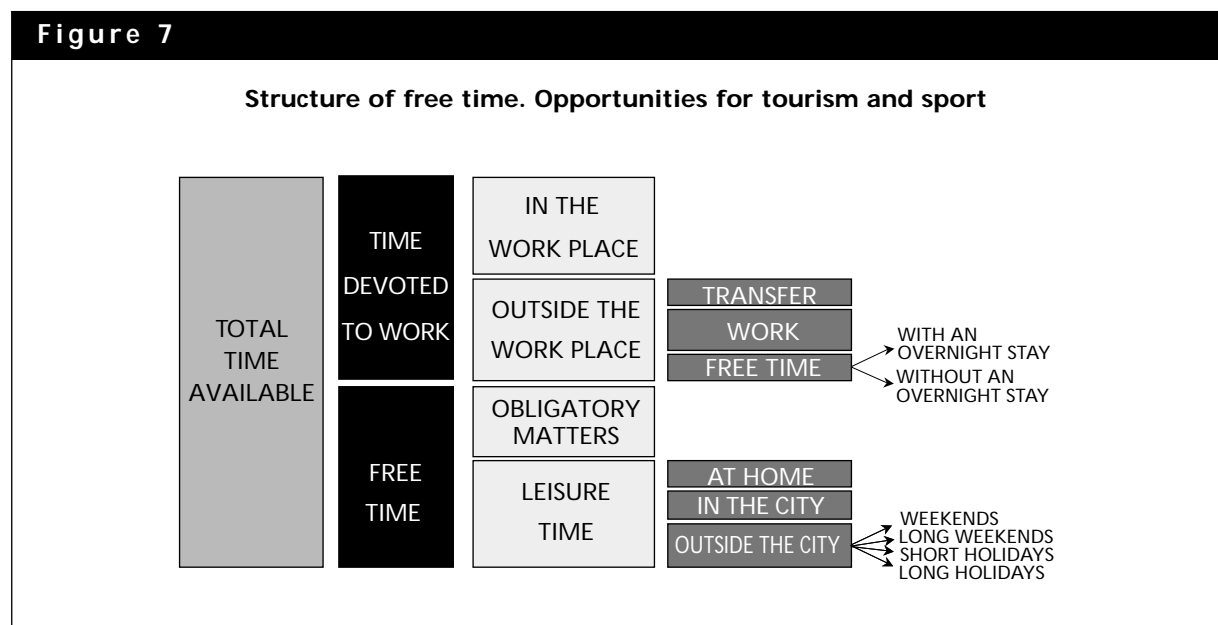
Source: Nuria Codina. *Emerging trends in leisure behaviour: serious leisure and its evaluation*. *Revista de Psicología Social, Spain*, 1999.

It is therefore relatively easy to explain the upsurge in tourism and sport –both active and spectator– on the basis of the increased availability of free time.

The time devoted to work can encompass a certain amount of free time, between trips, meetings and, above all, in the case of nights spent away from the work place during trips and meetings. The use of city hotel gymnasiums is closely linked to this.

Leisure time per se includes leisure hours spent in the city, hence the boom of gyms and sports facilities. It is no accident that big gyms have become an indispensable element of attraction in big urban leisure centres.

Finally, the leisure time spent out of the city –weekends and long weekends– is becoming increasingly important, hence the growth in the number of second homes and the upsurge in residential tourism. In these cases, sports facilities are often the main element of the appeal of a given product, e.g. golf and yacht harbours.



Source: A. Díaz.

The second key factor can be linked with demographic changes and purchasing habits and consumption. In this respect, it is important to highlight:

1. Higher living standards in developed countries and to a large extent in under-developed countries. Once people cross the poverty threshold, one of their first priorities is to distance themselves from their daily surroundings by travelling, even if only short distances. As living standards improve, travel becomes more far-flung.
2. The incorporation of women into the labour market, the ensuing increase in household revenue and the need to spend time with the family outside the place of usual residence.
3. The increase in the number of senior citizens, with substantially higher living standards than previous generations. This population segment generally has higher purchasing power, more time and less responsibilities. Seniors have become a target audience for all sorts of leisure-related initiatives and constitute a guaranteed audience for a large number of tourism products.

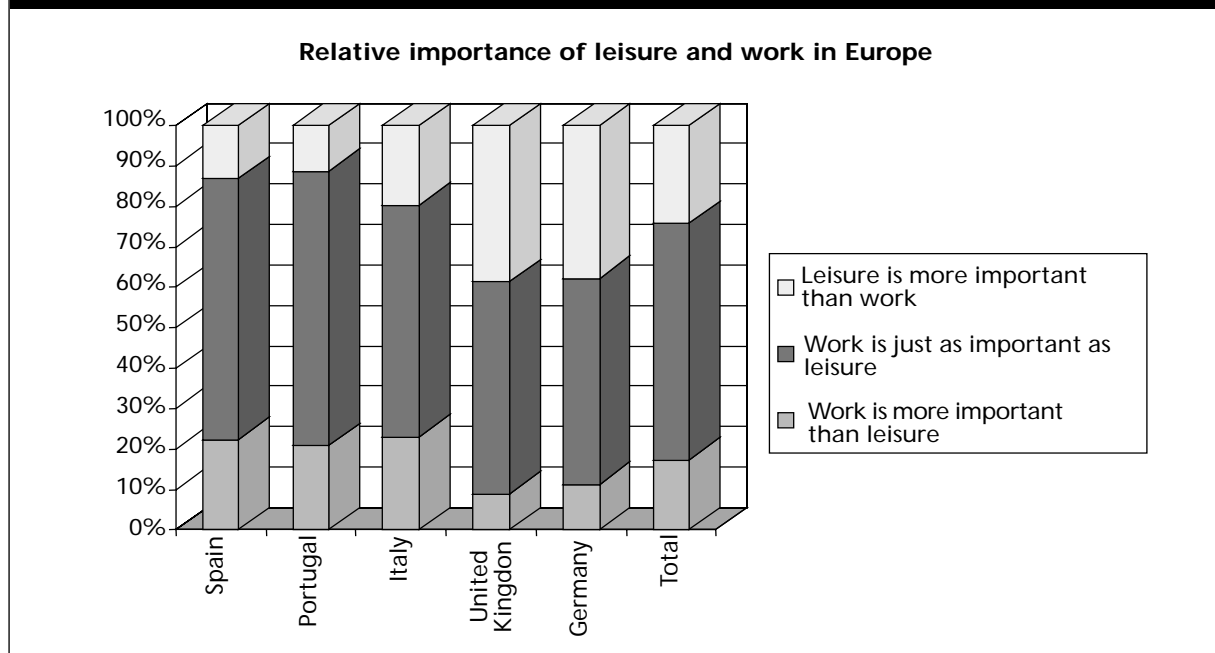
4. Flexible working hours, generating new requirements insofar as this provides more possibilities for free-time use on an independent basis rather than on the basis of when one should or is allowed to take time off work. This paves the way for the necessary creation of a vast array of new products and also makes it possible to tailor leisure and tourism products and services to a degree that was unthinkable only a few years ago.
5. The annual fragmentation of holidays means that mono-thematic holidays are a thing of the past. People now have time to enjoy sun and beach, mountains, sports, culture and gastronomy throughout the year and in whatever doses and seasons they choose. This is doubtless one of the elements that has most influenced the proliferation of active holidays.
6. As people travel more, the tourism cult is growing and travellers are becoming increasingly sophisticated. The focus is no longer on paying for a service, but rather on enjoying new experiences. The main priority is longer to lounge in the sun, but to get to know the destination and understand its inhabitants. In Western countries, where the travel habit has firmly taken root, motivations for travel are changing and the frequency of travel and the diversity of interests are increasing.
7. In today's world, there is no doubt that the average cultural level of the population has increased with respect to previous generations, hence the broader range of concerns and greater awareness of the environment, both in the home country and elsewhere. Concern with health and for getting to know and protect the world that surrounds us are now features that characterize today's consumers, who are better informed and more environmentally aware.
8. Despite the many wonderful advantages of modern life, our existence is also fraught with major disadvantages, not least stress and tension. The need to escape from the daily routine partly accounts for the success of holidays; the need to resume our youth activities in friendly and organized surroundings is also the cornerstone of sport linked with nature and travel.
9. Finally, mention should be made of widespread access to leisure. Nowadays, leisure not only forms part of our lives but has also become a basic requirement, and one that must be satisfied on the basis of consumer demands.

The third and final factor concerns personal self-fulfilment. This can in turn be linked with the mental structure of individuals and their priorities in terms of what they want out of life. In this respect, it is interesting to mention a survey conducted in Spain, with surprising results⁵, consisting of a comparative analysis of leisure concerns and the use that is made of leisure time in five European countries.

⁵ Josep Francesc Valls & Joan Sureda. "How Europeans perceive leisure" X International Symposium on Tourism and Leisure. ESADE-Centro de Direcció Turística, 2001.

The most outstanding conclusion concerns the different perceptions of leisure and work in the countries concerned. Far more importance is ascribed to leisure in countries that are considered to be more advanced from a social perspective, i.e. Germany and the United Kingdom, than in the Latin countries, i.e. Spain, Portugal and Italy. Overall, taking the average percentages for all the countries concerned, 24% of the population considers leisure to be more important than work, whereas 58% considers leisure to be just as important as work. Only 18% considers work to be more important than leisure.

Figure 8



Source: ESADE. Centro de Dirección Turística. X International Symposium on Tourism and Leisure. 2001.

It is also interesting to examine what people expect from leisure and free-time activities. In the same survey, the respondents were asked what activities they would like to devote themselves to, in addition to those they already practise in their free time. The main results are as follows:

- Going to the beach
- Personal training
- Hobbies
- Personal and health care
- Cultural activities
- Attending performances and shows
- Sport
- Seeing friends

The most prevalent activities in terms of what people actually do and what they would like to do are those linked with personal training, personal and health care, and sport. All these activities are practised to a far lesser degree than the respondents would like on a daily basis.

This fact clearly mirrors the concerns of present-day society, in which respect both tourism and sport have the potential to provide specific and satisfactory answers.

2.- THE TOURISM PRODUCT

To understand the potential in the relationship between tourism and sport, it is necessary to examine how the tourism product is conceived, as this has to be one of the answers to consumer needs and demands.

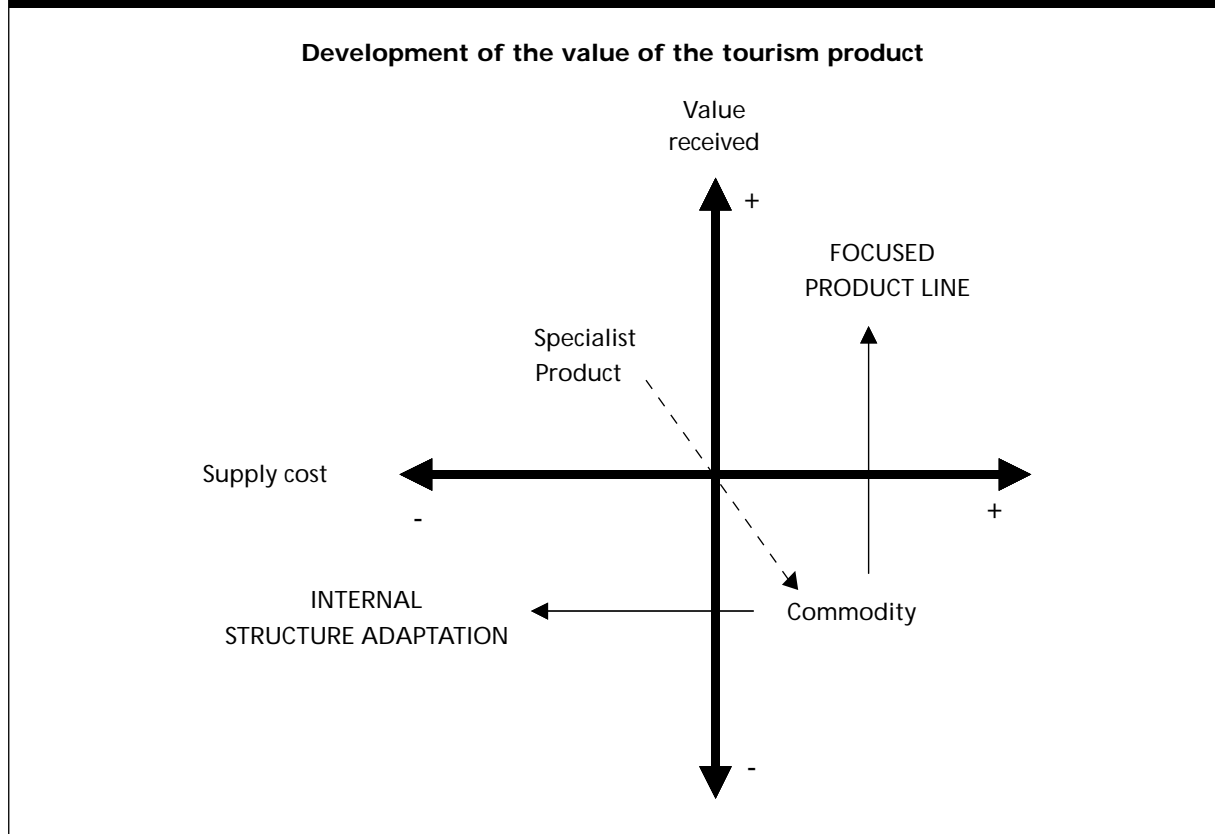
There is no doubt that the concept of tourism has changed radically in the last twenty years. An unstructured type of tourism that placed priority on travelling as far afield as possible and lounging about in the sun to the exclusion of practically everything else has given way to a form of tourism that is far more elaborate, from the standpoint of both the product itself and related activities. The most important changes, at all levels, are shown in Figure 9, which compares standard tourism in the 1960s with tourism in the 1990s.

Figure 9		
Development of the tourism production system in the last 30 years		
Characteristics	Tourism (1960s – 1970s)	Tourism (1990s)
Production concept	Mass tourism	Flexible travel and tourism options
Products	Rigidly packaged, mass and standardized holidays. Mass markets	Holidays: Flexible Segmented Personalized Environmentally-friendly
Production tools	Tourism packages Charter flights Franchises “Brand” holidays Offices, hotels, tourism centres	Yield management Specialized tour operators Competing destinations Independent holidays Greater role played by suppliers and agents
Organization of production	Economies of scale are very important Demand is anticipated, but future capacity is required “Holidays are saved”, just in case	Economies of scale Flexibility Proximity to the market Diagonal integration
Human resources and training	Seasonal labour Huge turnover of labour Work reputed to be badly paid Little labour flexibility	Multifunction, specialized and satisfying work with a value-added component
Marketing	Mass marketing Mass advertising	Maximum personalization
Clients	Inexperienced Apparently homogeneous Sun fanatics Predictable Motivated by price	Experienced Independent and flexible Different values Mature and responsible
Quality	Undifferentiated	Adjusted, monitored by the individual, importance placed on the process rather than the function

Source: Adaptation of Auliana Poon: “Tourism, Technology and Competitive Strategies”. C.A.B. International, UK, 1993.

But a more profound change has taken place in terms of how the tourism product is perceived by the consumer. When people started travelling, tourism was what marketing jargon dubs as a “specialist” product, generating high profit margins for suppliers insofar as the relative cost of supplying the product was low and the value perceived by the consumer high. Everyone was happy, the producer obtained high profits and the consumer bought an exclusive product.

Figure 10



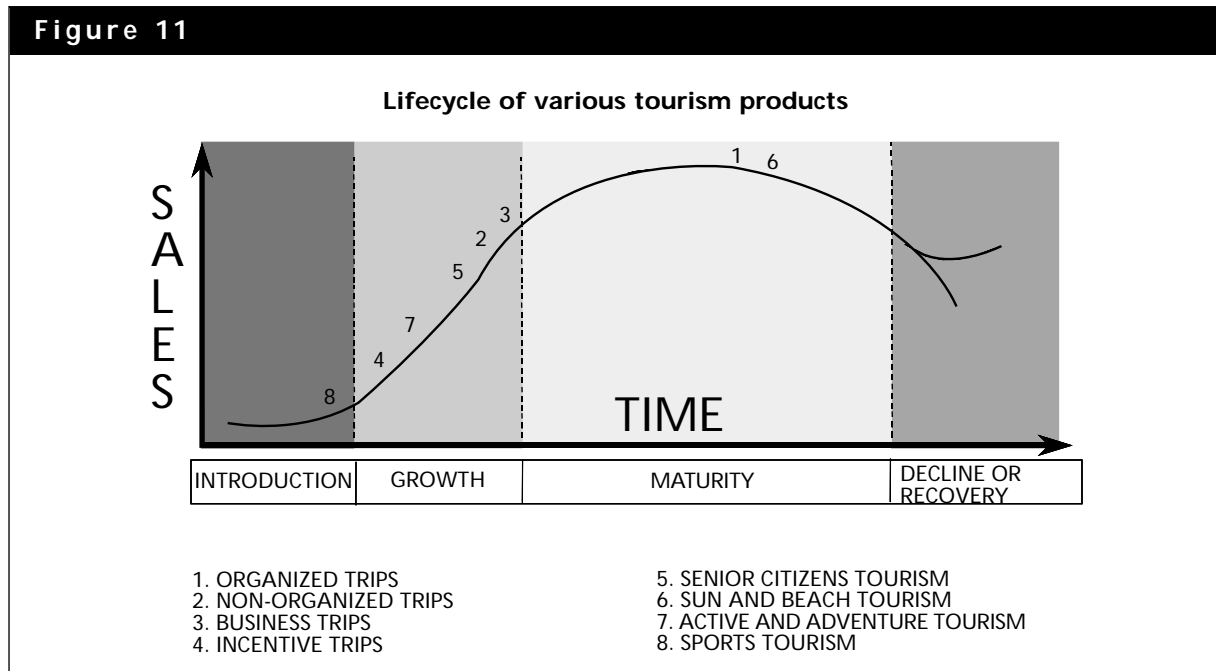
Source: Angel Díaz.

Nowadays, the vast majority of tourism products are raw materials with very few distinguishing factors. The cost of supplying these products is therefore high and profit margins consequently lower, in addition to which a higher turnover of tourists is necessary. Furthermore, since the value perceived by consumers is not high, the tourism experience no longer represents anything out of the ordinary. In this context, price tends to be the main competitive weapon and brand is considered to be practically non-existent, hence the difficulty in creating brand loyalty.

In these circumstances, tourism enterprises have no choice but to focus on a specific type of product in a bid to outdo the competition, or to focus on the product line and attempt to increase its value in a bid to differentiate themselves.

In this context, it is relatively easy to gauge the present status of sports tourism and its future as a tourism product.

If we analyse the lifecycle of various tourism products, we will see that sports tourism is still in the teething stages and is far less mature than other niches, such as incentive trips and adventure tourism.



Source: Adaptation of: Ahmad Rahnema, UNAV Congress, Tenerife, Spain, 1998

In this context, sports tourism and travel can be considered as a direct result of the changes in purchasing habits and free-time use by consumers in response to the more intimate needs of modern man, and also as an innovative product supplied by enterprises and destinations that are out to reposition themselves and renew their ranges of products and services.

Finally, it should be noted that the appearance of new tourism products, such as sports tourism, has been underpinned by improved communications and access to backup products and services.

3.- THE END CONSUMER AS A SPORTS TOURISM CONSUMER

3.1. Introduction

The practice of a sporting activity often represents a key factor in terms of selecting the place, date, duration, type of stay and even transport used for holidays. Sections 3.2 and 3.3 describe the most relevant results of a study published by WTO and the IOC⁶ relative to the importance of sports for German, French and Dutch tourists, and also examines certain other interesting aspects of the aforementioned Spanish study.

Irrespective of the trend shown by specific population groups to indulge in some kind of sporting activity during their holidays, climatic differences in northern and southern Europe generate a higher proportion of north-south travel in the summer months than south-north travel in the winter. Climate is also a determining factor for those who plan their holidays on the basis of being able to practise a sporting activity.

⁶ World Tourism Organization and International Olympic Committee. "Sports activities of German, Dutch and French tourists during their holidays abroad". World Conference on Sport and Tourism. February 2001.

Another overriding factor is the holiday periods that exist in the different countries. In Mediterranean countries, the population has an overwhelming tendency to take its holidays in the summer, whereas in northern countries, the population tends to spread its holidays throughout the year, although summer is the period in which the longest holidays are taken.

Climate also conditions demand for sports-oriented trips abroad. Sports holidays can therefore be classified on a seasonal basis: holidays devoted to summer sports, holidays devoted to winter sports and mountain holidays. Preference for one or other type of holiday is also determined by the climate in the country of origin.

The sports activities that condition holiday planning are principally outdoor sports that can be practised in a specific climate.

The range of winter activities is headed by snow sports such as downhill and cross-country skiing and snowboarding.

Summer activities include mountaineering, hiking, climbing, scuba diving, snorkelling, surfing, sailing, tennis, squash, badminton, canoeing, kayak, cycling, golf, fishing and hunting.

Finally, there are other sports activities that can be classified within the range of mountain holidays and accommodated in a number of categories in the previous classification: rambling / hiking, climbing and mountain biking.

The aforementioned activities determine a certain population typology that can be grouped on the basis of socio-demographic classification criteria such as age, gender, family lifecycle, income, socio-professional level, education, cultural level, etc. However, it should be noted that geography based on the destination region and climate is the main criterion used to segment or determine homogenous population groups in terms of the sports activities they practise during holidays taken abroad.

The practice of these sports is what determines some of the most important components from a tourism industry standpoint. These include expenditure, duration of stay, type of accommodation, information and reservation channels, time of year and the socio-demographic profiles of the consumer.

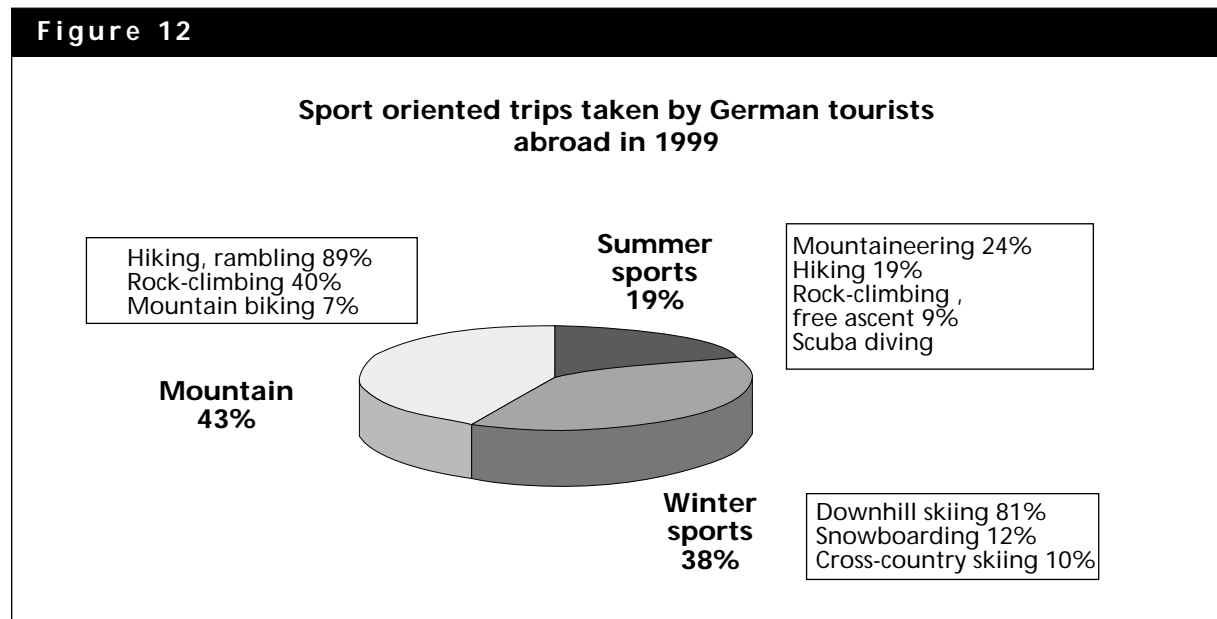
3.2.- Sport and the European tourism market

As shown in the Spanish study⁷, the top twenty holiday activities are headed by beach activities, seeing friends, and rest and relaxation. Sport appears among these principle activities half way up the table, but if we add mountain tourism, we will see that sport is an activity frequently practised by the Germans who holiday abroad. It should also be noted that people do not indulge in sport and mountain activities as much as they would like to.

⁷ Josep Francesc Valls & Joan Sureda. "How Europeans perceive leisure", X International Symposium on Tourism and Leisure. ESADE-Centro de Direcció Turística, 2001.

These data can be corroborated with the results of the survey on tourism and sport conducted in 2000 for WTO and the IOC by IPK International, according to which, in 1999, 58 million Germans spent their holidays abroad. 55% of Germans took part in at least some kind of sporting activity during their holidays.

The number of trips taken by Germans who planned their holidays on the basis of opportunities to practise a sporting activity was 11 million, a figure that represents a considerable increase with regard to the results of the same survey for previous years. The proportion of each type of holiday devoted to sport breaks down as follows:



Source: WTO-IOC. Data provided by IPK Internacional - World Travel Monitor

In the case of German tourists, the biggest percentage corresponds to mountain holidays abroad (spring, summer, autumn), followed by winter sports holidays.

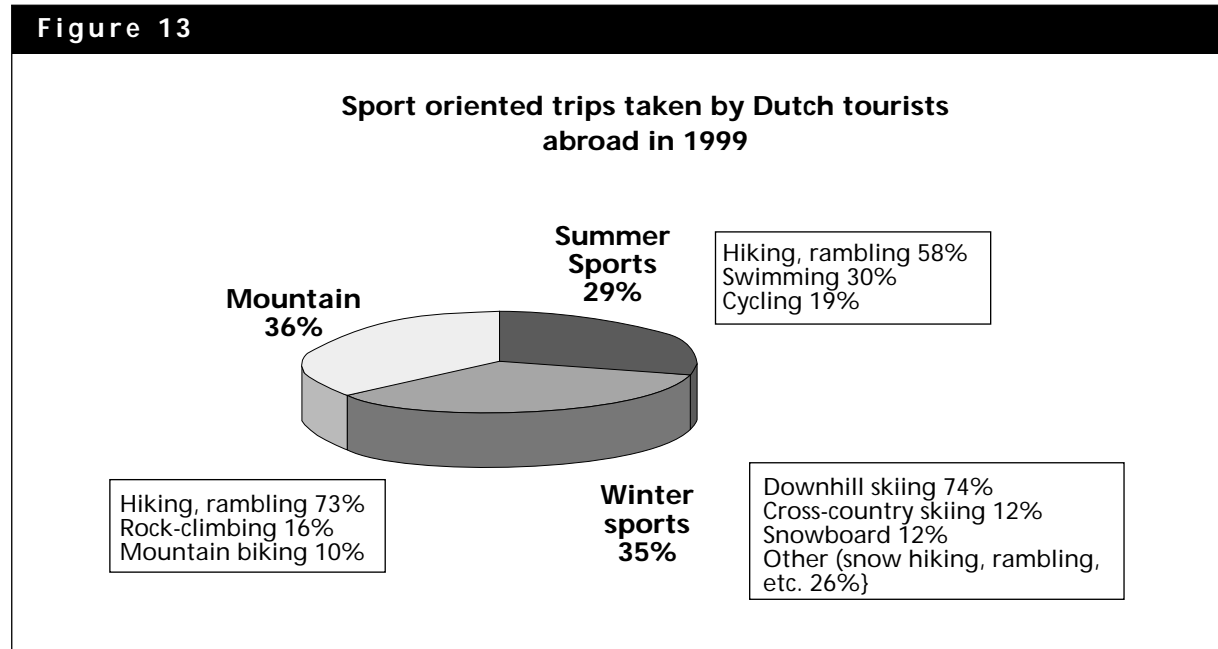
The sports activities included in these two sections have a number of similarities, which can also be considered as factors that influence the choice of destination and the sport practised. These are open-air activities that bring people into contact with nature, in this case mountain activities. Nature plays a very important role in terms of free-time use, natural areas being what people choose to practise these sports activities.

Some sports activities with a major impact on tourism do not appear in the previous table. A case in point is golf; 6% of the Germans who devote their holidays to a sporting activity mention golf in the range of summer sports.

Spain, France and Italy are the three countries preferred by Germans for these outdoor activities.

According to the WTO-IOC publication, 13 million Dutch tourists took foreign holidays in 1999; of this number, 52% devoted themselves to some kind of sporting activity.

The number of trips taken by Dutch tourists who selected holidays on the basis of the opportunity to practise a sports activity was 3 million. This figure has remained relatively stable with respect to the three previous years. The proportion of each type of holiday devoted to sport is shown in Figure 13.



Source: WTO-IOC. Data provided by IPK Internacional - World Travel Monitor

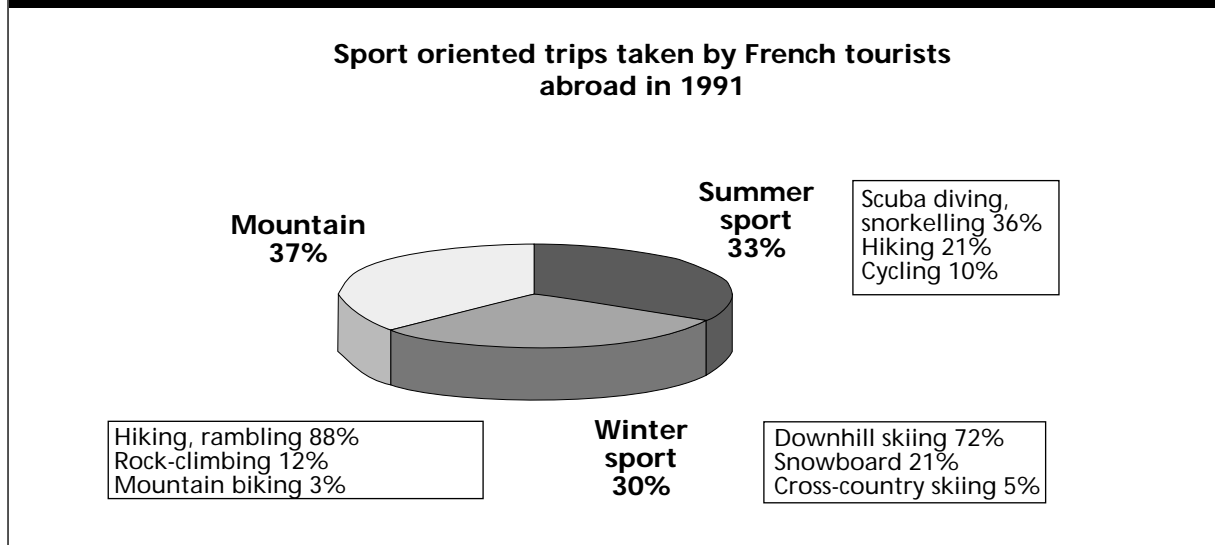
Once again, mountain holidays (spring, summer, autumn) represent the highest percentage, followed by winter sports holidays.

The range of sport practiced in summer sporting holidays include swimming and cycling, two options that are not so commonplace among German tourists.

According to the same survey, 15 million French tourists spent their holidays abroad in 1999 and 23% devoted themselves to some kind of sports activity during these holidays. Holidays not linked with the practice of any sports activity predominate; holidays planned on the basis of opportunities to practice some kind of sports activity represent 15%, a percentage that has remained relatively stable in recent years.

The proportion of each type of holiday devoted to sport is shown in Figure 14.

Figure 14



Source: WTO-IOC. Data provided by IPK Internacional - World Travel Monitor

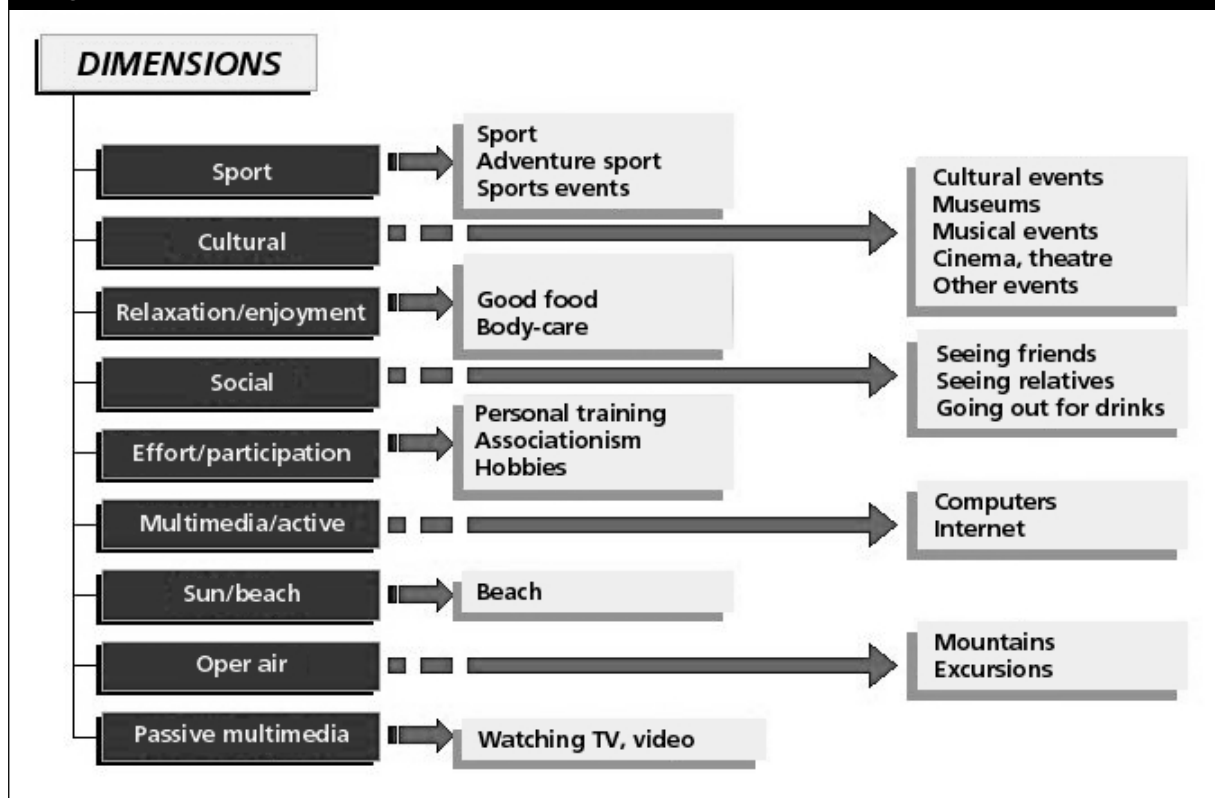
In the case of French tourists, mountain holidays (spring, summer, autumn) represent the highest percentage, followed by holidays devoted to a summer sport; the practice of winter sports abroad comes third due to the range of winter sports activities already available in France.

Scuba diving / snorkelling were the most frequently practised sports among the French during foreign holidays devoted to summer sports, followed by hiking and cycling.

3.3.- Sport leisure types

The Spanish survey took over 40 possible activities and structured them in nine dimensions, all linked with different forms of free-time use. These dimensions are presented in Figure 15. Two are directly linked with the practice of sport: the so-called "sports" dimension, which includes activities related to sport, adventure sport and attendance of sporting events, and the so-called "open-air" dimension, which encompasses mountain activities and excursions.

Figure 15



Source: Adaptation of: ESADE. Centro de Dirección Turística. X International Symposium on Tourism and Leisure. 20015

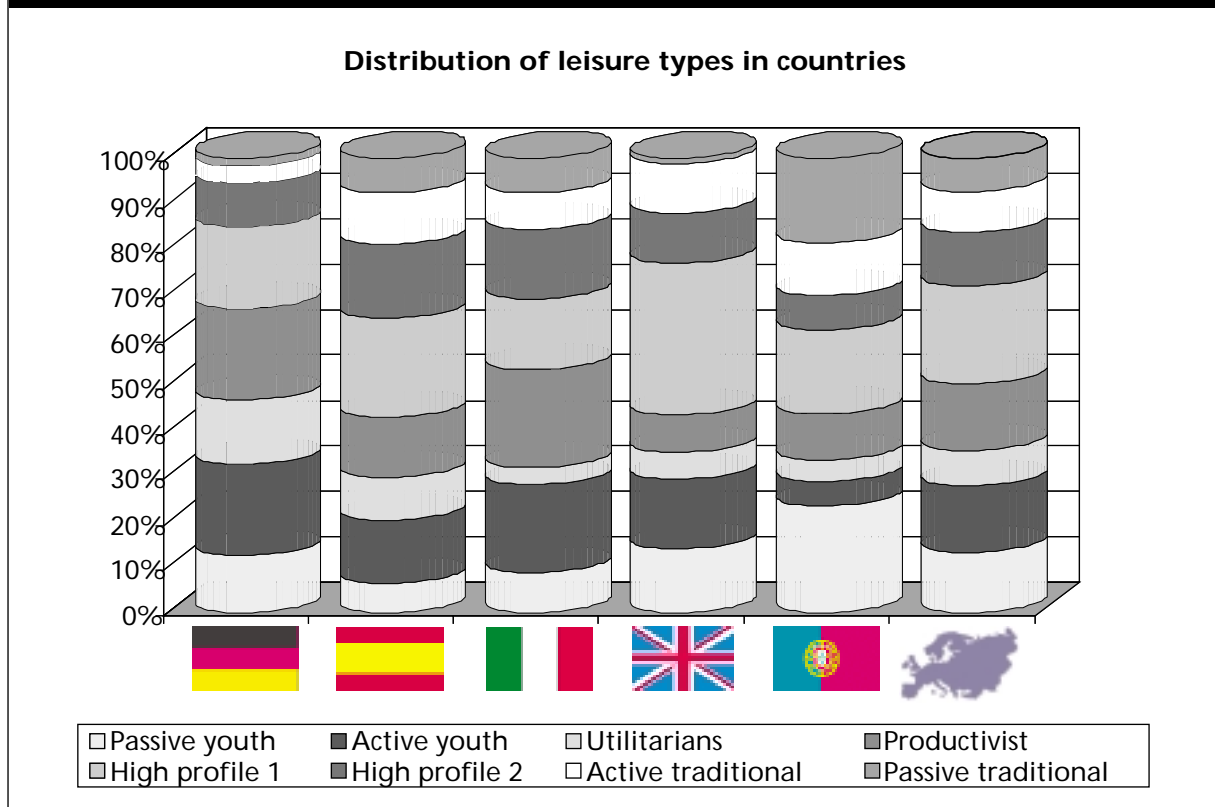
The survey respondents can be classified into various categories based on socio-demographic features, psychographic profiles, the activities they practise in their free time, and attitudes towards holidays and leisure. A total of 18 leisure types were defined; those classified in the survey as "active youth" and "productivist" are the only leisure types whose favourite activities include sport / the practice of sport

Both have high revenues and education levels, and most members of this group are aged between 25 and 45; gender and family lifecycle are not discriminating variables in this case.

With respect to the holiday behaviour of these two leisure types with a propensity to devote themselves to sports activities during their holidays, there is no homogeneous pattern in terms of holiday periods. Generally speaking, they have more holidays than the other leisure types defined; both consider leisure to be as important as work; most are satisfied with their holidays, and they also have the biggest propensity to lower their income in exchange for being able to take longer holidays. They also have the highest propensity to travel abroad.

These leisure types coincide in a number of respects with the typology of the German, Dutch and French tourist population that takes sport-oriented holidays, described in the WTO-IOC report, i.e. those who plan their holidays on the basis of opportunities to practise sports activities.

Figure 16



Source: ESADE. Centro de Dirección Turística. X International Symposium on Tourism and Leisure. 2001

3.3.- Effects on the tourism sector

Just as the practice of sports activity responds to more or less homogeneous population groups in terms of socio-demographic variables, special and homogeneous tourism consumption patterns can also be identified in this respect.

Figura 17

Foreign holidays more or less devoted to sport			
Holidays in which sport is the key element			
TOURIST	GERMAN	DUTCH	FRENCH
TYPE	Mountain sport, winter sport, summer sport	Mountain sport, winter sport, summer sport	Mountain sport, summer sport winter sport
COUNTRY O DESTINATION	Austria, Italy, Switzerland	Austria, France, Germany	Spain, Switzerland, Austria
DURATION	4-7 nights	7 or more nights	4 or more nights
MONTHS	January-April	May-August	May-August
ORGANIZATION	Advance booking	Advance booking	Advance booking
ACCOMMODATION		Hotel	Hotel Non-hotel
EXPENDITURE	Less*	Same	Less*

(*) Expenditure below average expenditure of tourists from each country when they travel abroad.

Source. WTO-IOC. Based on data provided by IPK International - World Travel Monitor

The physical and climatic variables and factors of countries are a key element in terms of choosing a destination for the practice of sport activities.

Many sports activities, if steps are taken to project them as tourism products in countries with climates that are conducive to the practice of sport, are activities that effectively stagger the tourist season and have great development potential.

Holidays that do not focus on sport are those for which the main purpose of trip is sun and beach and which take place in the May-August period. Spain is the top destination for all three markets. Generally speaking, average expenditure during these holidays is higher than expenditure during holidays devoted to sport.

The socio-economic development and typology of these tourists-athletes makes them a target audience for the tourism sector insofar as they contribute to reducing seasonality and are classified in the medium-high purchasing power bracket.

All the aforementioned surveys show that it is possible to correctly identify and pinpoint the audiences that are likely to be more sensitive and more open to sports tourism products.

The WTO-IOC study shows that a percentage of the population already plans its holidays on the basis of access to the practice of a sports activity. The Spanish survey shows that the parameters that best identify the audiences that are likely to devote themselves to a sporting activity during their holidays are more closely linked with outlooks on life and with psychographic and behavioural features, than purely demographic variables.

Without a doubt, the conceptual framework provided at the beginning of this chapter and the data produced by these surveys can be used for subsequent research geared to studying the relationship between tourism and sport in more depth, and progressively identifying the corresponding target audiences in more detail.

Official Conclusions

The first World Conference on Sport and Tourism, organized by the International Olympic Committee (IOC) and the World Tourism Organization (WTO), with the cooperation of the Generalitat of Catalunya, the Municipality of Barcelona, the Government of Spain, and the National Olympic Committee was held in Barcelona on 22 and 23 February 2001.

Sport and tourism are two powerful forces influencing global culture at the start of a new millennium and having an important economic and social impact. As a consequence, both organizations agreed to convene the first world conference on this subject, with a view to allowing better understanding of their mutual relationship and to generate more benefits for countries.

Over 800 participants from one hundred countries were accredited to the Conference. The Conference was officially opened by HRH Infanta Cristina and the Duke of Palma, in the presence of the IOC President, Juan Antonio Samaranch, WTO Secretary-General, Francesco Frangialli, the Spanish Secretary of Sports, Juan Antonio Gomez Angulo; the Mayor of Barcelona, Joan Clos, and the representative of the regional Government of Catalunya, Carme Laura Gil.

The Conference identified and underlined the following relevant issues:

1. The lack of formal collaboration between sport and tourism organizations was underlined. There is a need to develop this relationship at international, national, and local level, in both the private and public sectors. An important growth is expected for both activities in the future.
2. New consumer behaviours and consumption patterns are bringing important changes to both sport and tourism.
3. It was pointed out that there is a lack of information, statistical data, evaluation and conceptualisation in the fields of sport and tourism. This would require further research, publications and communication of results.
4. The Conference recognized the key role that the media and new information technologies have in the promotion and sponsorship of both sport and tourism activities.
5. Governments' support is crucial for the sustainable development of sport and tourism. Their policies should take into account the outcome of this Conference and establish consultative and cooperative mechanisms with all concerned parties.

6. It was highlighted that there is a need for an ethical approach to the development of sport and tourism, taking into consideration different cultures and ways of life, and implementing existing codes of conduct.
7. It was underlined that, in the long term, education is one of the most effective instruments in ensuring sustainable development of both activities.
8. Human resources are the basis of both activities, and specific training courses should be extended to foster professional skills in both sectors and facilitate the mutual exchange of knowledge and experience.
9. The Conference pointed out that there should be greater cooperation between industrialized and developing countries in sports activities and in the tourism industry, through increased technical assistance.
10. Sport, tourism and culture are complementary components of our society as they share the same objectives and reach the same social groups, although in different situations. The Conference stressed that these three elements play a crucial role in sustainable tourism development and the success of major sports events, such as the Olympic Games.
11. There is a need to encourage participation of local communities in the planning and sustainable development of sport events and tourism, enhancing the local culture and heritage as well as ensuring social and economic benefits from them.
12. There is a need to protect the environment in tourism and sport through better planning, structuring of demand and facilities, as well as training and education.
13. The Conference pointed out that, owing to the amount of the investments they require, sport events and related infrastructure should be planned and designed taking into account the needs of local communities and visitors, to maximise its long-term use. It was also highlighted, as another important criteria, that elite and sport for all requirements should be considered in these new projects.
14. The Conference expresses its sincere thanks to the organizers and their partners, especially the regional Government of Catalunya, the Municipality of Barcelona, the Spanish government and others institutions and companies of the city of Barcelona, for providing the excellent facilities and services which helped make this gathering a success.

ANNEX ONE

Presentations

Opening Ceremony

Francesco Frangialli

SECRETARY-GENERAL OF THE WORLD
TOURISM ORGANIZATION

Your Royal Highness,
Don Iñaki Urdangarín, Duke of Palma,
Mr Councillor for Culture and Sport, representing the President of the Generalitat,
Mr Mayor of Barcelona,
Mr Secretary of State for Sport,
Mr President of the International Olympic Committee,
Excellencies, Ladies and Gentlemen,

I should like to begin by turning to you, Your Royal Highness, to express our gratitude for having agreed to preside over this opening ceremony. We know how attached you are to the city of Barcelona. We also know that you take a personal interest in the development of tourism, as you proved by joining us in 1992 for the commemoration at Seville of World Tourism Day during the Universal Exposition. On this occasion, tourism and top-flight sport are at one since you are today accompanied by the Duke of Palma, thereby heightening our pleasure.

Ladies and Gentlemen,

Knowing full well that I cannot rival the linguistic skills of President Samaranch, who will speak after me, I shall continue to address you this morning in the language of Baron Pierre de Coubertin, which also happens to be mine.

On 25 October 1999, President Juan Antonio Samaranch and I signed a cooperation agreement in Lausanne between the International Olympic Committee and the World Tourism Organization.

In spite of its limited scope and the modest size of the two signatory institutions, this agreement is hugely significant.

It bespeaks the relation between and, to a large extent, the convergence of two of the most powerful driving forces of global society at the beginning of the twenty-first century: sport and tourism.

Two forces that bring people together; two forces that especially typify all that is good in the globalization process ongoing. Sport, and in particular the Olympic Games as the generator of events that now enjoy a blaze of publicity in the world media, events that form a bond of common fervour between peoples that all else may divide. When Cathy Freeman – what a

prophetic name! – wins medals, it is not only Australia that feels proud and more united; all the planet's forgotten communities have the impression that they too have won in respect and esteem.

But tourism too, which moves people in enormous numbers from one country to another – 700 million in 2000 and 1.5 billion in twenty years' time -, not only moves them but also brings them into contact with the inhabitants of far-off countries with very different cultures.

• • •

The cooperation that WTO and the IOC have initiated – and this Conference is one of its first visible manifestations – reflects the realization that sport is one of the most rewarding ways of filling leisure time, of maintaining physical fitness and of relaxing and learning; and that it has become one of the basic motivations of tourist travel, both domestic and international. Our two institutions share the conviction that, like tourist travel, the practice of sports and international competitions help to foster a culture of tolerance, pluralism, respect for others and, hence, of peace, a culture at once embodied in and conveyed by the Olympic Ideal and Charter and the Global Code of Ethics for Tourism.

Our two organizations are also convinced that, if properly directed and practised, sport and tourism can, and should, follow the logical path to sustainable development, which was set in 1992 by the United Nations Conference on Environment and Development – the *Earth Summit* of Rio de Janeiro – and which is the stated aim of the International Year of Ecotourism to be observed in 2002.

• • •

Ladies and Gentlemen,

There has been much to encourage sport and tourism to draw closer together.

The major sporting events incite people to travel in ever-greater numbers; they generate considerable income for the host country, the actual impact of which has not yet been properly assessed and is therefore undervalued. Large travel companies specialize in their organization or, like Club Méditerranée which, with the death of Gilbert Trigano, has just lost the visionary who was for many years its helmsman, promote new holiday forms based on the culture of sport.

These same great sporting events help in the long run to consolidate the position of leading international tourist destinations and to transform the image of the host countries. The spectacular success of the Sydney Olympic Games bore this out yet again in no uncertain terms.

Barcelona is living proof: the Olympic cities and sites have become world tourist attractions in their own right; the great sports arenas are visited by more and more people, a case in point being the *Stade de France* near Paris, which I am pleased to recall witnessed the host country's victory in the last World Cup football tournament; they are now part of the cultural heritage of the countries that built them.

It would be desirable to allow better use to be made of those facilities, created to stage international sporting events, for the benefit of both resident populations, schoolchildren and students in particular, and national or foreign visitors. May I say that I hope consideration will be given to the idea of subsequently using the sports and accommodation facilities, originally built for the Olympic Games, for tourism and leisure purposes and that in future it will be one of the elements taken into account in selecting the cities that are candidates for their organization.

Last, but by no means least, the competitive spirit and the practice of sports to such high standards play an increasingly prominent role in developing leisure sports for ordinary people. They contribute to the democratization and diversification of sport and, in so doing, are a major factor of cultural fulfilment, individual and collective alike. Tennis, golf, hiking, horse-riding, water sports and such activities have therefore lost the élitist label that may have been attached to them in their early stages. They encourage tourists to travel on an increasingly massive scale for the pleasure of practising them. The same applies to skiing and other winter sports, whose progress WTO gauges through the important technical conferences it holds at regular intervals in the Principality of Andorra.

• • •

Your Royal Highness,
Ladies and Gentlemen,

This Conference taking place in Barcelona, an Olympic city whose urban structure was remodelled, whose society was transformed and whose economy was revived by the 1992 Games, is not merely a time of recognition and encounter for the two major economic, social and cultural activities of which we are the spokesmen. It is the point of departure of an ambitious undertaking which will encourage a great many people from all walks of life to gather and work together like those assembled in this hall today; it is a far-reaching venture to which the World Tourism Organization, for its part, is ready to commit itself. We are at the starting blocks impatiently waiting for the signal to start the race.

Opening Ceremony

Juan Antonio Samaranch

PRESIDENT OF THE INTERNATIONAL
OLYMPIC COMMITTEE

Your Royal Highness,
Duke of Palma de Mallorca,
Ministers,
State Secretary of Sports of Spain,
Secretary General of the World Tourism Organization,
Madam Counsellor for Education of the Generalitat,
Mr Mayor,
Distinguished delegates,

On behalf of the Olympic Movement, I welcome you to the Olympic city of Barcelona, which is also my home town, for this first World Conference on Sport and Tourism.

Through holding the Games of the XXV Olympiad in 1992, Barcelona was rejuvenated and expanded its capacity to host sport and tourism.

It is in this privileged framework that Barcelona welcomes you to reflect on sport and tourism, two veritable economic generators of the modern era.

Sport has become a social phenomenon which mobilizes people and promotes cultural exchanges.

The Games of the XXVII Olympiad in Sydney provided a sporting and a cultural stage for all the continents, and boosted tourism in Australia.

The audiovisual coverage of sports competitions also leads to greater knowledge of the geography, history and culture of each nation and region.

Sport for all and tourism for all, which are complementary activities, are now part of governments' policies for leisure and well-being.

In 2001, which the United Nations General Assembly has proclaimed the International Year of Volunteers, the Olympic Movement, whose very foundation is volunteerism, is proud to make its contribution to the development of sport, leisure activities and tourism around the world.

To conclude, I wish to express my sincere thanks to Her Royal Highness the Infanta Cristina and the Duke of Palma de Mallorca, a sporting family, for honouring this opening ceremony with their presence; and the Generalitat of Catalunya and its President, H.E. Mr Jordi Pujol, and the Mayor of Barcelona, Mr Joan Clos, the Government of Spain and the sports movement for their close cooperation in the organization of this Conference.

I would also like to extend my sincere thanks to the World Tourism Organization and its Secretary General, Mr Francesco Frangialli, for their contribution to the planning of this conference, the first of this kind.

Thank you for your attention.

Opening Ceremony

Carme Laura Gil

COUNSELLOR FOR EDUCATION,
GOVERNMENT OF CATALONIA

Your Royal Highnesses, excellencies, ladies and gentlemen.

On behalf of the president of our government, it gives me great pleasure to pass on to you his cordial and personal greetings and welcome you to our country and to the city of Barcelona.

I am certain that during the next two days, distinguished experts figures from the fields of sport and tourism will analyse matters which are undoubtedly important in the area of economy and culture. There may also be space for further reflection. Today, sociologists and politologists discover to their surprise that collective identities, large or small, grow stronger in a globalized world. Today, at the start of the millennium and at the beginning of the 21st century, the combination of sport and tourism may be, as well, an old, pedagogical metaphor for our modernity.

Sport, so ancient and yet so modern, like the history of humanity, and tourism, so old and yet so new, like the curious minds of human beings, can be presented as renewed values. Sport is that privileged area where cohesion and collective integration can be developed, where the difference can be blended together in a joint project.

Tourism is an activity that allows us to discover the marvellous diversity of a thousand tongues and a thousand colours, to understand them, accept them, respect them and realise that we share a collective identity.

In Catalonia, we know a good deal about the structural power of sport because through sport we were able keep up our collective life, enrich, nourish and consolidate it with men and women who gathered here from all over the world. Also through sport, Catalan women, at the beginning of the 20th century, attained certain liberties unheard of elsewhere in the world at that time.

And it was with tourism, too, that Catalonia entered Europe, when the European Union was still a Utopia, perhaps because for us, in Catalonia, sport and tourism have been determining factors in structuring the character and mood of our society.

It is for that reason, perhaps, as some of you may well know, that sport and tourism are not only economic and cultural growth factors but are also values that can make people progress, turning competitiveness into an endeavor to compete, and also for collective progress as well, values that can enable us to accept difference and at the same time, take pride in our own identity.

And in a world like today's, where there is still solitude and individualism, sport and tourism can, undoubtedly, be privileged tools for building a better society which is supportive, united, wealthy, cultured and educated.

We are convinced, I am convinced, that observations will emerge from this Conference and its work that we can use as a guideline for our political and economic efforts. That is why I wish you all every success in your task, trusting that it will be productive and fruitful, and, at the same time, that you enjoy your stay with us.

Thank you.

Opening Ceremony

Juan Antonio Gómez Angulo

SECRETARY OF STATE FOR SPORT,
SPAIN

Your Royal Highness, Your Excellencies, the Duke of Palma, Mr. Mayor, Ministers, President of the International Olympic Committee, Secretary-General of the World Tourism Organization, Ladies and Gentlemen.

On behalf of the Spanish government, I want my first words at this opening ceremony to be of condemnation of the terrorist attack perpetrated this morning in the city of San Sebastián.

Tourism and sport are two factors which, in their capacity as opportunities for exchange and co-existence, help foster peace and freedom among the people of the world. Peace and freedom are two totally unrelinquishable factors of democratic societies.

I would like to join with my colleagues in praise of the magnificent initiative taken by the World Tourism Organization and the International Olympic Committee in organizing this Conference on Sport and Tourism, made possible thanks to the collaboration of the Catalan Government, Barcelona City Council, and the International Olympic Committee. I believe it is particularly appropriate because trends in the development of both these industries have much in common.

Nobody questions the fact that these two social phenomena mobilize millions of people the world over, but, what is more, both provide many fields for joint action, offering mutually beneficial opportunities which must be seized.

An advanced society such as ours needs, for its development, to have free time and recreation space in that free time. The features of recreation and leisure or sports tourism are: taking a break, active rest, amusement, live culture, and, especially, the fundamental component of hygiene and health.

This need has gained considerable importance in recent years, spelling implications for many sectors of the economy and producing a snowball effect.

By way of an example, according to European Community figures, it is calculated that sport today accounts for some 3 percent of world trade, and that the number of jobs generated by sport directly or indirectly in Europe has increased by 60% in the last ten years, reaching figures which, in 1999, amounted to about two million jobs.

In tourism, the results achieved in Spain in 1999, hitherto hailed as the most outstanding year in the history of Spanish tourism, will be surpassed yet again in 2000. In the year as a whole, we will see growth of over 3% percent in terms of inbound tourism, not to mention the

results for revenues, which are increasing threefold, confirming the improvement in its profitability.

The key figures for the industry in 2000 underscore the competitiveness of Spanish tourism, which accounted for 11% of the Gross National Product and generated foreign currency revenues of approximately 4,7 trillion pesetas in the period until October last year.

In 1999, Spain had 76,391 million foreign visitors, of whom 51.7 million were tourists. Their estimated consumption of Goods and Services amounted to over 8.8 percent of private consumption, that is to say, almost 5.5 of the final demand of the entire Spanish economy.

In 2000, during the period until October that year, Spain was visited by 48.2 million tourists, which undoubtedly is a new, record figure.

Two key factors contributed to this situation. In recent years, the business-tourist industry has made major investments in creating, revitalizing and modernizing what is offered to tourists, and vast improvements in its management. At the same time, a parallel effort by the government has seen substantial investments in transport and communications infrastructures, in environmental and public services and the design of support and incentive schemes to stimulate and orientate innovation efforts and the quest for quality in the tourist industry.

The tourist industry is experiencing a process of unstoppable globalization, as is shown by business groups meeting around the world and becoming more international.

At the same time, there is a need to adapt to deep-seated changes in demand. The mobility of new segments of the population; the fragmentation of holiday periods; the increase in short holidays, as well as summer holidays; the consolidation of an individual tourist making more demands on quality and the environment and calling for new products are all examples of those changes.

Finally, the introduction of the euro will bring with it, undoubtedly, new scope for the development of tourist activity. It will mean greater transparency in the markets, which will facilitate comparison between the price asked and the service offered, making the quality/price binomial work in favour of innovation and quality.

Furthermore, there is an urgent need to train businessmen and women and skilled professionals in the tourist industry to stimulate the diversification of products, creating a business culture in specific areas, such as sport tourism in all its forms.

In modern societies, sport and tourism mean dynamic social activities, open to a global world. Traditional tourist destinations are being supplemented by new tourist/sport offering, which have enormous potential and which will continue to increase, and consequently condition our market.

Regardless of whether sport is secondary to tourism, or vice versa, the fact is that as far as the consumers of those products are concerned, it is not the same to have tourism as it is to have sport as one's main objective.

As you know, there are travel opportunities for playing sport and travel opportunities for watching sport. And as far as the promotion of tourism is concerned, or as far as it is affected, it is equally important to attract tourists to watch sporting events, such as the Olympic Games

or World Cup Football, as it is to attract tourists who want to visit the country to play their favourite sport.

The staging of sporting events of national and international interest attracts visitors and professionals from the world of sport whose spending should be assessed in each specific case. That spending undoubtedly represents an economic impact made by sport on the economy.

On the other hand, mega-sports events, such as the staging of the Olympic Games, lead to major investments in sports facilities and infrastructures which, in turn, attract the development of other economic activities. These, in the long run, have other positive economic effects. Barcelona, the city we are in now, was a very good example to the world of what I have just said.

As regards tourists who come here to practice sport, the government, through the body responsible for the international promotion of tourism, Turespaña, has worked on using sporting activities as a means of attracting visitors, foreign tourists, to Spain.

The products towards which most effort is being devoted at promotion level are: golf tourism; water-sports tourism; so-called adventure tourism, which includes a series of other sports, such as hiking, mountain-biking, horse-riding, mountaineering and others; game shooting, tennis, and others.

As regards golf tourism, Spain has successfully joined the European and world trend to make the golf industry an important segment, not only in terms of sport but also as one of the principal tourist products in need of promotion and marketing.

Golf is a growing tourist attraction and a sport that attracts an increasing number of foreign players.

Recent trends in tourist demand indicate that golf is a very profitable alternative to other traditional products, since it is a major source of revenue. A golf tourist spends three times more than a conventional tourist, and the level of spending by golf tourism is expected to more than double in the next ten years, amounting to a total of 4 billion euros.

On the other hand, water-sport tourism undoubtedly has enormous potential, serving both to diversify demand and, particularly, to increase the variety of the Spanish tourist offering.

Water-sport tourism is a response to new trends in the markets: varied motivations and active holidays. And it is also a quality tourism segment.

In the last few years, the number and quality the infrastructure for water-sport tourism in Spain has increased considerably. The most important products are currently: marinas, cruises and water-sport centres. Their creation and development spell benefits for Spain's tourist offering by lengthening the tourist season.

Finally, I would like to underline the commitment of the Central Government, the Secretary of State for Trade and Tourism, and the Higher Sports Council, in particular, to promote the initiatives adopted at this conference which, undoubtedly, will have major implications for this country in view of its status as a sport and tourism world power.

Thank you very much.

Opening Ceremony

Joan Clos

MAYOR OF BARCELONA

Your Royal Highness. Your Excellency, Mr. President of the International Olympic Committee, Mr. Secretary-General of the World Tourism Organization, Mr. Secretary of State, Madame Counsellor, Madame Government Delegate.

Let me heartily congratulate the International Olympic Committee and the World Tourism Organization on choosing Barcelona as the venue for discussing tourism and sport. Because Barcelona is an excellent example of a city's development towards tourism and sport.

Historically, Barcelona was an industrial city, colourless, polluted, with no tourism to speak of and very little connection with sport. It was a manufacturing centre, a city of the industrial revolution. But of late Barcelona has undergone a dramatic turnabout, coming full circle, or perhaps more accurately making an about-face, since coming full circle would bring us back to our starting point. We have changed from a city with virtually no tourism into a tourism success story. We have set out down the path towards a new product, namely, urban and cultural tourism; a tourism based on short stays and high value added.

In the past ten years, the number of overnight hotel stays in our city has increased five-fold, and, I reiterate, this has been a radical change.

During the events of 1992, one of the most important factors was the breakthrough in the number of hotel rooms available in our city. It was a controversial decision at the time, but it has turned out to be an exceptional medium and long-term investment. This is because tourism in our city, which formerly accounted for 1 or 2% of the city's gross domestic product, today makes up over 12% of the city's gross domestic product.

I am pleased to be able to say here, in the presence of the World Tourism Organization and the International Olympic Committee, that the nature of urban tourism is closely related to culture, to sport and to culture. In large measure it is cultural tourism, in which all cultural events, be it an exhibition, music, opera, theatre, are extremely important. And I think that today it is appropriate to remember, and underscore, the efforts made by the International Olympic Committee through its cultural programmes associated with the Olympic Games. I believe that the trio of tourism, sport, and culture is a winning combination for the future. The President of the International Olympic Committee said the same thing in his presentation. Culture is the third leg of this three-way winning strategy for cities embarking on this change.

Please let me take a minute to talk about sport. A poor city, after a civil war, starting out towards industrialization. It was anything but enthusiastic towards sport. Obviously, there were some clubs and some sports organizations. But sport was not something taken for granted as part of people's everyday lives. In fact, sport was looked upon as an activity for the elite, an extravagance even, something standing aloof from popular tradition. It was a type of spirited luxury.

The shift in people's attitudes towards the significance of sport has itself been an extraordinary change over these past fifteen years, similar to the city's shift with respect to tourism.

From being regarded as something for the elite, sport has turned into something looked upon as a virtual necessity for staying healthy. And it will come as no surprise to hear that after the Olympic Games, there are 121 sports facilities in the city with over 350,000 card-holding members who pay a small monthly fee in order to be able to participate in sporting activities at these public facilities. To this must also be added the number of private sports facilities flourishing everywhere, all over the city.

Thus, just as in tourism, the city has also undergone a major change as regards sport. And in large measure this is thanks to the Olympic Games held in 1992, among many other factors, for which all of us who were in any way involved with the games will be forever grateful.

I certainly hope that the organizers will not only be making you work hard here at the conference, at the round tables, but will also allow you some free time to see Barcelona and wander around a bit and experience its many treasures for tourism, which it has, and for culture, which it certainly has, as well as for sport, which it also has. For instance, you will be able to see a sailing school that at the present time has 10,000 practitioners, making it the largest sailing school in Europe. It is located at the Olympic Harbour. I mention this as a sport in which Her Royal Highness takes part. And for a sport played by His Excellency, we have here in this city a club that has won the European Cup in handball five years running, and it too, is something worth seeing.

I wish you all a pleasant stay here in Barcelona.

Sport and Tourism to Stimulate Development

Dr. Dawid J. de Villiers

DEPUTY SECRETARY-GENERAL

WORLD TOURISM ORGANIZATION

This is the first presentation of the Conference and my objective is to lay a foundation for the discussions that will follow over the next two days. My introductory remarks must be read in conjunction with the **Introductory Report** that was developed under the auspices of Prof. Peter Keller. I will focus on a few subjects that will reappear in many of the presentations and discussions that will follow.

I would also like to draw your attention to a survey jointly commissioned for this conference by WTO and IOC and conducted by IPK on the **sport profile** of **outbound** tourist of three European countries. My time is too short to present the survey. However, at the conclusion of my presentation I will highlight a few of the interesting findings.

Sport and Tourism is a wide-ranging and complex subject. I will address the subject under four headings:

1. THE SOCIAL-CULTURAL NATURE OF SPORT AND TOURISM

Both sport and tourism have become integrated components of the global culture of our times. Tourism and sport are two ancient expressions of the human spirit. Since the earliest times people travelled – not only as nomads seeking new pastures for their animals, but also as explorers – driven by a curiosity to discover new worlds.

Travel is deeply rooted in human culture, behaviour and values. I have no time to dwell on this but tourism has played a major role in breaking down the borders and barriers of distrust and prejudice between countries and people. It contributed to better understanding, greater tolerance and to world peace in general. The same can be said of sport. Both international tourism and sport have enhanced the process of globalisation and contributed to peace and prosperity. Both have inspired many young people to achieve new goals and make their dreams come true.

The values of society find reflection in the way people tour and travel and in the way they play and practise their sport. It is because tourism can never be an end in itself but only a servant of humanity that the General Assembly of WTO approved a Global Code of Ethics for Tourism.

2. THE RATIONALE OF SPORT AND TOURISM:

There are many similarities between sport and tourism, but also fundamental differences. Tourism is an **experience-orientated** activity, while sport is a **performance-orientated** activity.

The experience-orientated dimension can best be illustrated by quoting the example of Joseph Pine in his book "The Experience Economy". The price of coffee on a coffee plantation would be about 1 cent. Coffee – in this context - is a **product**. Once it is roasted, sorted, professionally packed, it becomes a **commodity** and the price per cup may rise to 25 cents. The same coffee - freshly ground and brewed in coffee shop - becomes a **service** and the price could be 100 cents. However, if it is served in New York or London or Paris in one of these trendy new coffee boutiques such as Starbucks, it is an **experience** and the price could be 500 cents. The ambience and style of the shop becomes a theatre and the coffee an experience. Tourism provides people with experiences.

Sport is a **performance-orientated** activity. It is by nature competitive and the rewards for winning and achieving success become progressively bigger as the levels of competition increases. Leisure sporting activities are a world away from the competitive intensity of high-powered professional sport. The elite sports have all become professional with major entertainment value. The media and the sports equipment industry financially drive them. The leisure time sport public as well as amateur sport participants and young people - provide the market for the sports equipment that are popularised through Superstar sport endorsements. Performance is richly rewarded. The publicity, money and social status enjoyed by successful athletes create a powerful incentive to train with relentless dedication.

The noble inspiration of performance and excellence in sport can be derailed by the use of performance enhancing drugs. We must not close our eyes to the fact that in both sport and tourism there are negative abuses that conflict with the codes and objectives of WTO and the IOC. Drug abuse in sport and child abuse as well as environmental degradation in tourism, are examples. We must continue to work with dedication to reduce and where possible eliminate these practises.

The reality is that sport and tourism also reflect the **values** and **lifestyles** as well as some of the **sub-cultures** of the fast changing social structures that characterise our global village. New trends and lifestyles emerge and they have a significant impact on tourism and sport.

Tourism was traditionally more orientated to the idea of rest, relaxation and finding relief from psychosomatic wear and tear. The need for tourism to provide this therapeutic service remains important in the high stressed society of our day. However, the emphasis has shifted more to health and quality of life issues. This trend gave rise to the need to include physical and sporting activities in tourism products. The "feel good" or "wellness" experience has become a new growth sector in tourism. People want active holidays where they can enjoy the "good things" (sport, exercise) for which there is no time in their everyday life. This created a boom in leisure time tourism sport like cycling, golf, jogging, mountaineering, hiking etc.

The evolution of sport and tourism continues. The young free-style generation of today has taken to a whole range of new adventure type sports such as skateboarding, snowboarding, and other alternative games – also referred to as "extreme sports" At the same time the artificial experience-based worlds of sport – such as "aquaparks" and "skidomes" are

sprouting up everywhere. These leisure time sports have grown in popularity and many of them have established themselves and receive regular TV coverage. "Extreme sports" involve increasing numbers of young people who are losing their interest in traditional or elite sport. The competition between extreme and alternative sport, on the one hand, and elite sports, on the other hand, is also increasing.

The challenge is constantly to adapt and renew the supply of products and services to meet the changing requirements of emerging generations. It is a known fact that sports disciplines as well as tourism products are subjected to **life cycles**. With time they lose their original appeal and importance. Management of the process of renewal and the re-designing of products and services is a field where sport and tourism can exchange valuable experiences. Co-operation in this field will be mutually beneficial.

Tourism and sport are **inter-related**. The one renders a service to the other. Major sport events such as the Olympic Games and the world cups in football and rugby, have become important international tourism attractions. The remarkable success of the recent Olympic Games in Sydney is a good example of the significant tourism impacts such events can have.

Likewise the tourism industry has served as an "incubator" for new sport disciplines. Tourism provided an opportunity for leisure activities to be popularised. With increased popularity they developed into formally organised sporting activities. Some even progressed from leisure activities to Olympic sports. Volleyball and snowboarding are two good examples.

3. THE ECONOMIC IMPACT OF TOURISM AND SPORT:

The exceptional growth of tourism over the last 50 years is one of the most remarkable economic and social phenomena of the 20th century. The number of international arrivals shows an evolution from a mere 25 million arrivals in 1950 to the 698 million of 2000. That represents an average annual growth rate of more than 7% over a period of 50 years – well above the average annual economic growth rate for the same period. Tourism has clearly outperformed all the other sectors of the economy and has grown into the most significant economic activity in the world.

Let me give you a few indicators of the size and impact of the Tourism Industry today. According to WTO statistics, tourism:

- on average contributes about 7% of the world's GDP (4-10% in developed countries and much higher in some of the developing countries and island states).
- about 8% of the world's exports through international visitors' spending on goods and services. That makes tourism the leading export earner – ahead of the automotive industry, chemicals, food, computers and fuels.
- generated income of US\$ 476 billion in 2000 – that is the amount spent by tourists annually.

The positive impact of tourism and sport on society and particularly on economic development is often misunderstood or underestimated. One reason for this lack of understanding is the absence of reliable statistics that would reflect the knock-on effects of sport and tourism activities.

It is against this background that the development by WTO of TSA (Tourism Satellite Accounts) will increasingly become a valuable tool for policy and planning purposes. TSA has the objective to establish a basic language with common definitions and classifications that will provide a picture of the tourism sector in its **totality**. The TSA methodology may also find useful application in assessing the contribution which sport makes to economic growth and employment.

4. CO-OPERATION BETWEEN SPORT AND TOURISM INSTITUTIONS:

I have already reflected on the fact that sport and tourism are inter-dependent and that there are many areas of common interest. They are both socio-economic forces that require constant renewal. Both have to build and protect their images (their brands) and have to manage negative perceptions and abuses. They have to popularise their activities and transfer a friendly and accessible image. In management they have much to share. The growing number of degree courses for sport management and destination management shows that there is considerable interests in making sport and tourism organisations more efficient.

The sharing of knowledge and experiences could be most beneficial for both Organizations. I would like to conclude by proposing that one of the outcomes of this World Conference on Tourism and Sport should result in **closer institutional co-operation between the IOC and WTO**. The areas of co-operation could be determined by an evaluation of the results of this Conference.

The creation of an **IOC-WTO Sport and Tourism Observatory** would be particularly useful for the pooling and diffusion of knowledge relevant to these two fields. Further collaboration in research and knowledge transfer would certainly pay dividends. An economic evaluation of the contribution of tourism and sport to development is a research topic that deserves urgent attention.

I believe it is the right time for such an initiative.

DR. DAWID DE VILLIERS *assumed the post of Deputy Secretary-General of the World Tourism Organization in 1998. Before joining WTO, he was South Africa's Environment and Tourism Minister in the government of National Unity. He has also served as South Africa's Ambassador to London and has held a number of cabinet posts since 1980. Dr. De Villiers played a key role in the negotiations that facilitated South Africa's transition to democracy. In the area of sport, he represented the South African National team in rugby from 1962 to 1970 and as captain from 1965 to 1970. He was named South African Sportsman of the Year in 1968 and 1969.*

Economic Impact of the Olympic Games on Tourism

Josep Miguel Abad

DIRECTOR GENERAL OF THE
ORGANIZING COMMITTEE OF THE
GAMES OF THE XXV OLYMPIAD IN
BARCELONA 1992

Having organized the Games of the XXV Olympiad in 1992, Barcelona is in a perfect position to achieve, with solid guarantees, some of its important objectives of the end of the century and also to orient and promote its future development, which is currently a fabulous reality.

Barcelona's growth and the efforts it has made to hold the reins of Spain's economic development are systematically accompanied by events of international magnitude. This is a historical constant which was reseeded during the World Fairs in 1888 and 1929, as well as during the 1992 Olympic Games.

These large events have always been used to encourage the modernization of the city, increase our organization capacity and promote our image abroad. The Olympic rendezvous in 1992 was a catalyst for many public and private initiatives that, if planned accordingly, would offer a unique opportunity to lay the foundations of a collective, orderly and prosperous development. The Olympic Games themselves did not complete this challenge; they were not the panacea. Nonetheless, they were a great source of energy, and it was our responsibility to decide how to best use this energy. We had the tool in our hands. Thus, we were the ones who had to find the future responsibility.

I would like to establish a few principles along these introductory lines so no one thinks that the Olympic Games, themselves, miraculously resolved the problems that existed.

The Olympic Games are, obviously, a sporting event, but they are, above all, a great social event. I would even dare to say they are the most well attended cyclical social event in the world. The number of spectators speak for themselves. Experts estimate that almost 3 billion people watch the opening and closing ceremonies. Without beating around the bush, one can say that Barcelona, Catalonia and Spain entered all households in the planet. Also, long before the magical inauguration date, established during the candidature phase, Barcelona was already being mentioned by the media all around the world. The city received an unprecedented amount of stunning free publicity. Barcelona's Olympic trajectory enabled the city to be "*placed on the world map, at the same level as the large cities*". It is impossible to estimate the cost of such a large promotional campaign, but we can affirm (without fearing to be wrong) that we would certainly not have had the means to pay for it.

Today, almost nine years later, not only can we confirm that the Games have had a totally positive result, we can also say that their effect has remained. This is most noticeable in the constant increase, in terms of quantity and especially quality, of tourism not just during specific seasons but all year long.

I refer to the many conferences, symposiums, trade fairs and professional gatherings that people hold in Barcelona instead of other cities. The pressure of demand is so strong that it explains and justifies the creation of new conference centres or of first class hotels, planned or completed. The efforts hotel sector representatives took during 1988, 1989 and 1990 to stop this increase in the hotel offer now seem very strange! Thankfully this suicidal short-sightedness was not backed by the public administrations or by the people in charge of the Olympic projects, nor by the dynamic entrepreneurial sector.

If the world considers the organization of certain Games as good or very good –the Games in Barcelona were unanimously considered “the best in the world”–, it is undeniable that the after-Games effect exceeds all the expectations that existed during the Olympic Games. Evidently, this effect must be constantly maintained, as it would be catastrophic to rest on one’s laurels. This explains the efforts public and private organisms which are involved in the promotion of Barcelona constantly carry out. Therefore, this post-Olympic effect is not a work hypothesis, it is a proven reality, provided it is carried out correctly, as is everything in life.

As well as the economic and social boost organizing the Games entails, it also allows the improvement of the host city’s strategic infrastructures and its outskirts. The Games were the main pretext for giving the go-ahead to many public investments which were planned but had not been carried out, although they were needed, so as to vitalise the territory. One of the main characteristics of Olympic projects is that they always have a time limit. One starts off at zero, reaches maximum speed for a few years, then returns back to point zero after a few days, once the closing ceremony has taken place. This exceptional, “infernal” rhythm requires such a large investment that, in ordinary conditions, it would need a much larger amount of time. However, this clearly brings about a social and economic boost that is much more dynamic.

In other terms, and to use an everyday expression, the Games allowed the city to pass the test. In terms of infrastructure, Barcelona had various outstanding constructions on hold. The Games were the best occasion to finish them, they were the catalyst I mentioned beforehand. It would take too long to state all the works that were carried out (road, sea and air transport, means of communication, accommodation, waste disposal, etc.). From the point of view of town-planning, some of the most important phases were: the reconditioning of Barcelona’s seafront, including its coastal protection plan, the rehabilitation of an urban space that had completely deteriorated and had become separated from the rest of the city –allowing the recuperation of almost five kilometres of beaches, which citizens appreciated–, the covering and suppression of the railway lines along the coast –which hindered the access to the beach–, and the construction of the Olympic village.

Although they are very important, all of these urban infrastructure improvements did not have the same direct impact on tourism as the improvement and diversification of the complementary offer did with the creation of large leisure centres, the rehabilitation of the historical city centre, transformation of old harbour warehouses into first class tourist and commercial centres, the pursuit of operations to renovate facades and rehabilitate buildings, the creation of cultural centres such as the ‘Casa de la Caridad’ or the Auditorium, renovating the ‘Pueblo Español’ complex (Spanish village), etc. This put an end to the historical curse that had condemned Barcelona to live with its back to the sea. Currently, the European Union’s blue flag flies on our beaches as a symbol of quality.

Obviously, the improvement of these infrastructures and public equipment was not an isolated phenomenon. As could be expected, the contagious wave of Olympism reached the private sector. Not only were new hotels constructed, existing ones were also improved and modified. This revitalisation of Barcelona's tourism sector also allowed the excessive difference that then existed regarding tourism during the four seasons to be balanced out a better quality/price relation, give clients to receive better service, guarantee safety, etc. It also allowed us to offer new things, which were known as "other forms of tourism", such as weekend tourism, (especially aimed at the Spanish market), cultural, sporting and gastronomic tourism, and to diversify the tourist liaisons, etc. In other words, it was a case of enlarging and reinforcing quality tourism.

The improvement of our industry had, and still has, effects that have repercussions on other components of the tourism sector: travel agencies, tour-operators, camp sites, apartments, means of transport, airlines, businesses, etc. Directly or indirectly, tourism favours investments in many other economic sectors, such as construction, the leisure industry, services, etc.

We are facing a challenge we took up collectively. In 1992, the whole world counted on us, and I really think we met their expectations.

The city had decided to offer the world much more than just an incomparable physical presentation. Barcelona's cultural and hospitable tradition led us to enthusiastically relay the message of peace, harmony, dialogue and progress that emanates from our authentic character. And we did so ardently. It seemed that, for a few weeks, the world was more tolerant, supportive and even happier.

Sometimes we are asked what the secret of our success was I would like to mention just one of the many key-ideas that guided us in our work, and dedicate it to the future host or candidate cities.

When it comes to planning the organization of an edition of the Olympic Games, one can choose between two important strategic models: one that subordinates the interests of the Games to those of the city and country, and one that subordinates the interests of the city and country to those of the Games. Barcelona opted for the first strategy, clearly and transparently. We decided to make the Games benefit the city and its citizens. Olympic history is full of examples of both of these models and an outside observer can make a clear distinction between those Games which were profitable and will carry on being so despite the passing of time, and those which failed and did not lead to anything, or what is worse, in no way served the citizens.

JOSEP MIGUEL ABAD was the Chief Executive Officer of the Barcelona Olympic Organizing Committee (COOB '92) from 1987 to 1992. An architect by profession, Mr. Abad worked as CEO of the Barcelona Exhibition Centre prior to taking on the task of organizing the Olympic Games. He was also deputy mayor of Barcelona for Urban Planning and Public Works. He is currently General Manager of Strategy and Business Development of the Planeta Corporation, Spain's largest multimedia group.

Infrastructure for Sport and Tourism

Rémy Charmetant*

Savoie is a small French department whose principal economic activity is tourism. Over ten years it has worked hard and been privileged to organise many sporting events on its territory: the XVI Olympic Winter Games in Albertville in 1992, the world rowing championships in Aiguebelette in 1997, the matches of the last sixteen and the quarterfinals of the world handball championships in January 2001 in Albertville, when the French team was on its way towards the world title. In 2002 they will be holding the world canoe-kayak championships in Bourg-St-Maurice, and then the biathlon in Haute-Maurienne.

They have gained the right to this privilege because of two visionaries who decided to build a Savoie of tourism and sports for the 21st century. They were Jean-Claude Killy, triple Olympic champion and IOC member, and Michel Barnier, who is currently the European Commissioner in charge of regional policy.

From this, one can understand the importance that the sport-tourism question posed for Savoie, whether sports were recreational or high-level competitions. Savoie belongs to natural space formed by the Alps with lakes and mountains that are perfect for practicing many winter and summer sports.

RELATIONS BETWEEN SPORT AND TOURISM

Certain sports generate large tourist flows with which they sometimes merge to a point of confusion: a clear example are winter sports, which currently represent a very important part of winter tourism in France and need large-scale infrastructures. Certain sports need external infrastructures but they do not attract tourists, although they can sometimes be used as attractions for theme holidays. Finally, some sports which have world competitions at the highest level with very high media exposure, require on such occasions substantial tourist infrastructures.

* MANAGING DIRECTOR FOR TOURISM, DEPARTMENT OF SAVOIE (FRANCE); MEMBER OF THE NATIONAL COUNCIL FOR TOURISM; EX-SPORTS DIRECTOR OF THE ORGANIZING COMMITTEE FOR THE XVI OLYMPIC WINTER GAMES IN ALBERTVILLE IN 1992; MEMBER OF THE IOC COORDINATION COMMISSION FOR THE XX OLYMPIC WINTER GAMES IN TURIN IN 2006.

TOURIST-SPECIFIC SPORTS

The sports that attract a large number of tourists who actually practice them generally need a particular natural environment. The most well-known are skiing and other snow sports, white-water sports, nautical sports, all types of hiking, rock-climbing, mountain-climbing, cycling, air sports, fishing, hunting and golf. So as to be able to practice these sports one needs a means of transport, accommodation and naturally, the equipment for each activity.

Various studies carried out in France by the National Tourism Council have shown that many sports, such as skiing, have a future but that one must take into account the demographical and sociological changes of clients and that this will have an effect on the infrastructures. One of the dangers these sports pose for tourism is in the evolution towards practicing sports in urban or pre-urban artificial sites or virtual sites.

NON-SPECIFIC TOURIST-ORIENTED SPORTS

Sports that are not specifically tourist-oriented can become so when world championships are held or where there are permanent training centres. So as to make advances in the field of infrastructures, one can use a 'customers' or a 'users' approach.

What do sports spectators, young sportsmen, educational sportsmen, competitive sportsmen, sports organisers, sports journalists, 'official' sportsmen, sports sponsor... need in terms of infrastructures?

Each group of clients has its specific needs in terms of recreational or work terms but they all need to be welcomed, accommodated, transported, fed and amused, and that is where tourism comes in. The Olympic Winter Games, organised in a mountain valley, cumulate all these needs, as they include almost all categories of sportsmen including youngsters taking part in ski schools, spectators, the media, official persons, and the organisers.

THE SAVOIE EXAMPLE OF THE XVI OLYMPIC WINTER GAMES IN 1992

When Albertville and Savoie presented their candidature in 1983, the main problem was the tourist infrastructure, which then became a sporting problem and led to sustainable development.

Apart from reflecting on the possibilities of sport, the public decision-makers had to study how to meet the traditional needs of the local population and those of the tourists by means of a common characteristic: phenomena of peaks related to seasonal tourism and to the sports calendar.

During the 1980s, the ski resorts of Savoie were among the leading centres for practicing winter sports and had a high number of efficient ski lifts, modern ski slopes, an accommodation capacity that was large yet unbalanced, almost nonexistent ice facilities, poor cultural amenities and above all limited accessibility in a competitive tourist-related economy: during peak season, it took several hours to travel from Geneva to Tarentaise.

Whatever the issue, the candidature to host the Olympic Games allowed Savoie to rapidly improve its road and railway infrastructures.

Once the candidature had been approved, organising the Games allowed the region to meet this objective by creating high-quality sports facilities, improving the quality of accommodation, using modern technology, modernising or constructing hospitals, equipping Savoie with cultural facilities, renewing its religious heritage and boosting rural development.

Given that the organisers had the duty to present results and the imperative need for the Games to start on time, structures that would be impossible to create due to administrative, financial or technical reasons could all be put in place on time. This is the magic of the Olympic Games and of large-scale projects. Public and private funding becomes accessible. All of this allows a long-lasting development.

SPORTS INFRASTRUCTURES

These concern both competitions and training sessions. They must at least comply to the conditions set by the International Sports Federations. The organizing committee must complete the synthesis between the Federations' point of view (who set the rules but do not pay) and that of the present and future users. The owners and managers should integrate the post-Olympic use of the facilities.

The Alpine and Nordic ski slopes at the Albertville Games all had a dual sport and tourist function: they would be used for the World Championships (International Criterium of the first snowfall in the Val d'Isère) and also as ski slopes for the general public. Ski lifts and artificial snow are part of this.

The ski-jumps in Courchevel do not have a directly tourist-oriented function, as this sport can only be practised by sports Federations, although training sessions and competitions are tourist attraction in Courchevel, especially during the summer.

In terms of ice-related sports, the four ice-rinks in question (Albertville, Courchevel, Méribel and Pralognan) have a specific sporting function (training periods for national and local teams, international competitions), but also a recreational function for the tourists and the resident population. Thus, it exceeds the purely sporting purpose given its versatility: the Olympic hall in Albertville has hosted world handball competitions and concerts by Johnny Halliday and Michel Sardou and hotel fairs. Bobsleigh and luge are a particular case: from an overall economic perspective, the construction of an artificial track to practice these sports was questioned due to its cost (FF 250 million, £23,481,482) and the number of potential users, plus the safety equipment it would need given its status of a 'classified facility'. However, the bobsleigh track in la Plagne was the price of the Games. Now it was a case of making it work. Structurally it was showing losses, but it had a great tourist impact in terms of visits by sportsmen and the practice of bob-raft. Despite the cost of construction and running, bobsleigh and runningtracks are still being built.

In total, the cost of the Olympic sports infrastructures for 1992 exceeded FF 1 billion (£94,696,220).

MEANS OF COMMUNICATION

This was at the heart of the Olympic Games project for Albertville and boosted the creation of motorways and fast roads; the arrival of the TGV (High Speed Train) in Bourg-Saint-Maurice; railway and coach stations were created or renovated; and the Chambéry-Aix les Bains airport was modernised and extended.

Under the theme 'aides-toi, le ciel t'aidera' (help yourself, heaven will help you), public and private partners invested FF 5 billion (£473,481,100) in setting up cross-subsidization.

The result: a road network that was able to meet to the general traffic demands generated in the Savoie region, security was brought up to new levels given this new grade of circulation and natural risks, a developed landscape with the layouts and a modern concept of motorways from the point of view of the environment, landscape and the integration of works of art, plus competitive railway access: the French TGVs and the North European fast trains served the stations in Tarentaise during the winter. The airport in Chambéry opened up to the market of charter flights with the advent of modern medium-haul aircraft.

ACCOMMODATION

A plan for modernising the Savoie hotel network was launched in 1988. It involved 211 hotels, and FF 40 million (£3,787,848) of subsidies towards funding FF 420 million (£39,772,412) worth of work. The programme has since been updated three times with the financial participation of the Savoie Area Council and the Regional Council of the Rhône-Alpes.

Transforming a summer spa resort, Brides-les-Bains, into an Olympic Village for the Winter Games was one of the most difficult challenges, and entailed the construction of a cable car that linked Brides-les-Bains and the ski resorts in Trois Vallées. This challenge has been met to day both in terms of communal finance and in terms of tourist numbers.

The Club Med villages in Plagne, Tignes and Val d'Isère were used to accommodate the athletes.

INFRASTRUCTURE FOR THE MEDIA

The media's needs are far greater than those of the local population or tourists. Thus, many temporary constructions were required. However, the Albertville project had an original idea: to set up the Main Press Centre and the International Radio-Television Centre in disused factories in La Léchère and Moûtiers. Industrial buildings were transformed into accommodation, gymnasiums, cinemas, cultural centres, shopping centres, covering a 40,000m² surface.

OTHER INFRASTRUCTURE

Other were created for the Games and later used to satisfy the needs of the tourist population reconstruction of the hospital in Albertville, renovation of hospitals in Moûtiers and Bourg-St-Maurice, a cleaning up programme, reduction of the telecommunication network with the arrival of radiotelephone and fibre optics and the implementation of a network of efficient meteorological stations.

In the cultural domain, the Olympic deadline allowed the exceptional financing of a restoration programme and the revaluation of Savoie's historical heritage, plus the creation of the Dome Theatre in Albertville and the Jean-Jacques Rousseau multimedia library in Chambéry.

All the efforts in the infrastructure field, allied to human will and new possibilities for cooperation enabled Savoie to modernise its tourist amenities and meet the needs of the clientele more effectively: emergence of environmental initiatives cultural and heritage tourism, new forms of skiing, etc.

CONCLUSION

Given their size, impact, the excitement they raise, their image, their mobilisation capacity and their global issues, major sporting events make it possible to create infrastructures that lead to sustainable development in record time. Their natural dimension concerns the Winter Games more specifically, although their gigantism dimension also affects the Summer Olympic Games.

In terms of tourist economy, the infrastructures that were created for the Winter Games in Savoie have made it possible for the region to welcome an annual 21 million visitors who spend the night in hotels in the area. The revenue from the ski lifts amounted to FF 2.2 million (£208,331) last season. The road network can cope with 35,000 vehicles (before the Games were celebrated, the maximum figure recorded in Tarentaise during school holidays was 18,000 vehicles). The ratios that evaluate the internal and external effects that the large-scale road projects are higher than average. Ten years after the Games, a new plan for security and road access is underway.

All of this is extremely important in the competitive world of tourism.

Every cloud has a silver lining: the Games in Albertville were staged during a period of economic recession and tight monetary policy. Many common 'supports' encountered financial difficulties, which have mostly been recovered nowadays. They have rediscovered the path of growth and borrowing capacity.

Sports tourism can generate user conflict by means of the infrastructures it creates or because spaces are occupied for different reasons. This is mainly the case for water sports, but it is hard to imagine rowers without lakes and fishermen without any rivers.

Major sports events are comparable to high speed trains: taking the fast train can take you quickly from Tokyo to Nagano, from Brussels to London or from Paris to Albertville; however, if one misses it, it takes a long time for the next one to arrive.

In certain conditions, the Olympic Games allow for sustainable development by means of celebrating an ephemeral sporting event that cannot be repeated in the same place: the organising committee for the Games is born with a programmed expiry date.

So as to meet this objective, the stages of the candidature and the planning are vital. It is then that the post-Olympic uses are decided, and the temporary and permanent elements are established.

Major sports events currently attract a large number of candidates. Whatever the continent, almost all projects are backed by an idea of development and mobilisation of energy. The Games are never hosted for no reason.

RÉMY CHARMETANT was Sports Director for the Organizing Committee of the Olympic Winter Games of 1992 in Albertville, France, and is currently a member of the IOC Coordination Commission for the Olympic Winter Games of 2006 in Turin, Italy. He is also director of the Albertville venue for the upcoming World Handball Championships to be held later this year. Based in Chambéry, Mr. Charmetant is the General Director of Tourism for the Savoie Department of France and a member of the French National Tourism Council.

Structure of the Tourism Sector

Martin Brackenbury

CHAIRMAN OF WTO BUSINESS
COUNCIL AND PRESIDENT OF
INTERNATIONAL FEDERATION
OF TOUR OPERATORS

1. INTRODUCTION

It is an enormous privilege and pleasure to have been given this opportunity to participate in this important conference. Important because tourism, widely recognised as the largest industry in the world, creating income, jobs and taxation revenues for infrastructure and the public services that are required in a civil society, is working together with sport, the largest leisure industry in the world that has the capacity to engage the young and old, to excite the passions and emotions of the many, rich and poor everywhere. Both tourism and sport are global phenomena, both are going to influence greatly the kinds of lives we lead, both have the capacity to enrich our lives.

My task today is to illustrate the size, scope and structure of the tourism industry. I want to speculate on future developments and then to examine the interactions of sport with tourism to the benefit of both activities.

2. SIZE, SCOPE & STRUCTURE OF TOURISM

The WTO statistics put international arrivals at 653 million in 1999, but to that figure should be added all of domestic tourism that might well be ten times the international arrivals. The main drivers of investment in tourism even in many developing countries has moved from the requirements of international tourism to domestic tourism as those economies have developed. As discretionary income has grown so has the wish of many citizens to explore what their own country has to offer before making their first trips abroad.

Tourism is mostly comprised of small and medium sized enterprises. In Europe it is estimated that 95% of all tourist enterprises are small and medium sized.

These cover travel agents, tour operators, restaurants, excursion suppliers, hoteliers and so on.

Having said that, there are a few giants in the tourism business. Some, like Cendant, Accor and Sol Melia are principally operating in the hotel/accommodation sector.

Others, like Preusag, C&N and Airtours are integrated leisure travel groups that, between them, have some 52 million customers. These companies are vertically integrated and spread geographically. They comprise travel agents, tour operators, airlines, hotels, cruise shops and ground handlers. In Europe, independent international travel still remains the norm, with the organised sector having a penetration of well under 50% of the market. Domestic tourism is largely organised independently.

At Airtours we have 15 million customers, 2,600 travel agents, 80 main operating brands, 52 aircrafts, 93 hotels and several cruise ships. Geographically we operate from 14 originating countries to over 60 countries around the world.

In order for the activities to take place effectively we have contracts with over 10,000 sub-contracted suppliers – the small and medium sized enterprises mentioned previously.

Let us look at the roles of each of the sectors:

Travel Agents

Travel agents act as agents of the customer until a contract is made. They then act as an agent for the principal—the tour operator, airline, hotel—from which they can obtain commissions.

A good travel agent will provide advice to customers and help ensure that mistakes are not made. They also make bookings on behalf of customers for travel, accommodation and activities in the destination.

Tour Operators

Tour operators organise the elements of a holiday into a package. The package usually comprises travel and accommodation but can, additionally add on other activities – safaris, skiing, trekking, etc. This enables travel agents the convenience of selling the packages already organised by the tour operator.

Tour operators thus act as wholesalers, selling through the retail trade: the travel agents. Some tour operators do sell direct to consumers. The contract that the consumer makes is not with the travel agent for package holidays but with the tour operator. The tour operators in Europe are governed by national regulations adhering to the terms of the EU Package Travel Directive.

The Directive is concerned with ensuring that consumers have information prior to their purchase, that contractual terms are transparent and with what happens if there are breaches of the contract. This means that the activities of tour operators are strongly regulated throughout Europe.

The tour operators make contracts with airlines, accommodation suppliers and ground handlers for supply of service. These contracts can be for payment on usage but are more usually taken as blocks (of seats or beds). The “blocks” then have to be paid for whether they are used or not. But the transfers of the commercial risk to the tour operators means that the seats and beds can be obtained for less – and those benefits are passed on to the customers as lower prices. This makes sense for both parties. The airlines and hotels have lower commercial risks and, although the tour operator then takes on that risk, the tour operators, working closer to the customers, have lower risks of not filling the spare capacity than the original suppliers.

Very often the tour operator provides representative services in the destination – thus providing a “bridge” between the residents in the destination and the customers. This can be very helpful in educating the customers what to expect and the resident suppliers what to provide. Service standards are continuously revised as a result of this interaction.

The Airlines

The airlines consist of the *normal scheduled services*. These, as their name suggests, have timetables (schedules) that last for a number of months both for summer and winter. They usually have several classes (first, business and economy), they provide food and entertainment as well as interlining services (eg. British Airways, Iberia, Air France, Alitalia, American Airlines).

The second kind of scheduled services are provided by the *new low cost "no frills" airlines*. These provide very low cost point to point air travel, with no food or interlining services. They are modelled on the highly successful South West Airlines that have their headquarters in Dallas. They operate a simple low cost high productivity service – usually with one aircraft type, travelling 1-2 hours only, point to point (eg. Ryanair, Easyjet, Go, Buzz).

The third type are the *charter airlines*. Typically these are co-owned by tour operators. This means that the commercial risks are taken by the tour operators and the airlines become the "transport division" of the tour operators. Generally they operate one class – but recently premier class have appeared, particularly on long haul routes. The aircraft are used very intensively indeed and load factor occupancy levels are very high. This enables the tour operators to include the lower seat prices into their packages. They are called charters as they are chartered for a limited period to operate (usually) point to point. Their names are – Britannia, Airtours International, Monarch, Air 2000, Hapag Lloyd, Condor, etc. These carriers form part of the package but also provide "seats only". These are seats sold from regional airports to the resort destination, usually by the tour operator.

The Hotelier/Accommodation Suppliers

The great majority of the *hotels* are run independently by independent entrepreneurs. There are however some small local chains with up to 35 hotels, as well as some large chains with hundreds and, in some cases, thousands of hotels operating in the leisure sector. The hotels vary in quality according to different price points. Tour operators contract hotels in the 2 Star to 5 Star categories.

In addition, in Europe, about 50% of all accommodation is in *apartments*. Usually organised as apart-hotels. This arrangement gives consumers added flexibility for eating out as well as lower initial "ticket" prices.

A small percentage of people stay in *houses and villas* rented to them privately or through tour operators.

The Cruise Ships

Cruise ships are floating hotels – often with different classes – some of them are absolutely gigantic. So big are they that they sometimes dwarf the places that they visit. This is a very fast growing segment of the market that is centred around the Mediterranean from May – October and in the Caribbean from November – April.

The Ground Handlers

The ground handlers are not handling the earth. Instead they provide the all important terrestrial services – coaches, excursions and representation that are required to enable the holiday to take place. For the most part these are locally owned and derive their value to tour operators from their ability to solve problems locally, through their local knowledge and contacts.

The Tourist Board

The tourist boards are organised to promote either nation states, regions or localities. They play a very important role – their job is to sell the destination. The tour operator's role is to sell the hotel/apartment in the destination along with all the other sub contracted services. Countries are like brands, they conjure many different thoughts and emotions. Spain, Italy, Greece conjure very different images from Iraq, Iran or Kazakhstan.

Segmentation & Specialisation

As in most markets, homogeneity has given way to heterogeneity. Customers have become more experienced and, as a result, know much more precisely what they want. Tourism suppliers have sought to satisfy each segment of the market that they have identified and target their communication activities to them through brochures, advertising, point of sale materials and public relations. There are tour operators offering bird watching to walking holidays, from climbing Everest to voyages in the Antarctic, from skiing to scuba diving, from archery to falconry. Whatever your interests and tastes there is likely to be an organisation out there seeking to satisfy them and make a little money in the process.

3. FUTURE DEVELOPMENTS

Consumers

Consumers are not only more experienced they are also much more confident than they used to be. This means that they are increasingly persistent for good service – service that is slow, bureaucratic or lacking personal warmth leads to impatience, exasperation and ultimately to rejection. Consumers can and do choose. The tourism consumer really is king, or more often, queen.

Of course, at the more price sensitive end of the market, consumers are prepared to make more compromises than those at the top. But even at the highly price conscious end of the market, failure to provide people with what they want leads to failure in the market.

We tend to think that fashion drives many choices but it is often the simple forward straight service issues that people look for first such as safety, security and cleanliness.

Customers have driven segmentation, the marketeers have just identified target groups of customers with specific needs. These, often subtle, interactions of service and activities lie at the heart of innovation in the tourism sector.

Sport and tourism have had a fruitful history. For example skiing and swimming for fun have led to interest in skiing and swimming in competition – and then watching the best athletes in the world perform.

Interest in sport is usually generated at school among the young – they then have the opportunity to participate – some excel and become the athletes of tomorrow, others of us can only dream and watch what wonderful performances can be achieved.

Sporting heroes that used to be local are now likely to be global. The globalisation of sporting heroes has been brought about through television and mega-events. The mega-events give the athletes the opportunity to compete with the best in the world.

There is no doubt that the worldwide web gives further importance to this trend. Information on the five continents is becoming much more readily available on the web. This means that specific information needs of customers can be realised on the web. This richness of information is likely to put customers and suppliers together much more easily than in the past. The web will act as a market place.

Many have suggested that the internet bubble has burst. The reality, as always, is more prosaic. The huge opportunities to reach more customers cheaply has been exaggerated. But more and more people are using the web for bookings. I spoke to the owner of the Inter-Continental Hotel in Mexico City recently – he stated that 3% of bookings were made via the web in 1999 – in 2000 the figure had risen to 17%. Make no mistake, the web is here to stay, and with the arrival of interactive TVs instead of PCs usage will accelerate dramatically.

Greater experience and greater confidence means that the consumers are less likely to seek to rely on advice of an intermediary. If the principals organise themselves properly then considerable disintermediation is likely to occur.

However, hoteliers and airlines are still going to rely on good tour operators for distribution of their products. The reason is that tour operators fill hotel beds and airline seats back to back. No other commercial mechanism delivers that kind of productivity.

All this means that marketers are going to design a different marketing mix for the new products that they wish to bring to the market.

The mix of tourism and sport, specifically mega-events, is intriguing. For countries, mega-events represent a huge investment, investment for regeneration and to obtain a repositioning of the city and country involved in the public mind. Barcelona has been well rewarded for its vision and selection of judicious investments for the Olympic Games. An investment that is still reaping dividends.

Tourism that benefits from promotional activities of countries, otherwise has to rely on its own resource for communication to customers.

So the mix of government monies, tourism monies and sponsorship monies (an essential ingredient for successful mega-events – usually provided by the global consumer corporations) can produce a potent force for good. A public/private partnership to be proud of.

The joining of the five continents for tourism and for sporting achievement is likely to be the strongest growth segment for tourism worldwide.

Australia, which has just hosted a hugely successful Olympic Games, has adopted a strategy of a rolling programme of mega-events in different sports. The effort required in mounting these mega-events is so massive that there might be the danger of collective exhaustion or entertainment fatigue. But the Australians have a record of extraordinary sporting prowess so they are likely to be an example to us all, as Barcelona was before them. The challenge for the rest of us will be to emulate them.

***MARTIN BRACKENBURY** is director of international relations at Airtours Plc.—the largest tour operator in the UK— and chairman of Trekinvestco, which runs specialist operators Exodus and Peregrine Adventures. He is president of the International Federation of Tour Operators (IFTO) and chairman of the Federation of Tour Operators of the United Kingdom. As chairman of the World Tourism Organization Business Council, Mr. Brackenbury has successfully initiated a number of research projects in the areas of: trends in the use of leisure time, tourism taxation, online destination marketing, and public-private cooperation. He is also the director of the Christel DeHaan Travel & Tourism Research Institute at Nottingham University in the UK.*

Sport Federations, Clubs and Supporter's Associations

Joan Gaspart

PRESIDENT OF THE FOOTBALL
CLUB BARCELONA,
PRESIDENT HUSA HOTEL GROUP

I would like to start by talking about sport as a generator of tourism. I believe that sport is a means of generating tourism, surely the most important means or one of the most important means.

In this age of communication, sport and tourism are two very complementary activities and sporting events, whether football or Olympic Games or any sport at all, have shown that sport does generate tourism in the cities and countries where an important sporting event is held.

How can visitors be motivated to attend an important sporting event? I would divide the question into two. Some sporting events don't call for much motivation so that the city which has the honour of organising the Olympic Games or a European cup final or a European or world competition of any sport, whether it be football, swimming, athletics, etc., does not need to do much encouraging because people get hold of the information and know quite well that the Olympic Games are going to be held in a particular year, on set dates, in a particular city. And the great advantage of this sort of motivation is that any major event that happens to be held in that city automatically becomes known as "the Olympic Games of Sydney, or Barcelona, or Rome", whichever city it is, and is never called "the Year 2000, 2004, or 1992 Games". What sticks in the mind is the name of the city where they were held, far more than the country where that city is located.

On the other hand, it's in the small events, and since you have here a football man, in each week's matches, where motivation counts. And at this point I could explain that *Futbol Club Barcelona* has introduced a system which, as far as I know, doesn't exist in other cities, specially to motivate the fans of the team visiting the *Barça* in a championship match, whether it is the Spanish League or a European competition.

For example, if there is a match on tonight in Barcelona, in the UEFA competition, and as a result there are over 1,000 people in Barcelona today, supporters of this Greek team, who have decided to take this opportunity and the excuse of a football march to do a tour of Barcelona and get to know the city better.

Consequently, the role of the clubs and federations in trying to generate tourism through sport is crucial. For the clubs, through initiatives such as the ones I have just described, in trying to get the people who have to play against your club to come to the city to take advantage of the fact that a match or sporting event is being held there, and for the federations, in doing their best to see that international or national sporting events are held in the city or in their country.

What happened in Barcelona, since we are in this city today, my home city, puts it in a nutshell. Just a few years ago in Barcelona, before 1992, although just after '92 too, occupation of hotel rooms stood at 45%. After the Olympic Games and after other major sporting events, Barcelona, in the year 2000, closed with an 86% occupation rate. It would be unfair to say that this spectacular increase in terms of occupation and in the number of tourists -Barcelona was visited by some 4 million overnight tourists in 1990, and this year the figure stands at almost 8 million – doubled just because of sport, but, inevitably, if we have to point to the most important reasons for it, and give a ranking of why this city of Barcelona is today visited as it is visited --apart from other reasons such as conferences, conventions, holidays or just getting to know the city-- it all boils down to the enormous promotion that the city was given as a result of the Olympic Games.

But before the Olympic Games we had another example, which I would like to tell you about. In Barcelona, and in Spain, the World Football Championship was held, and a memorable match was played in Barcelona between Brazil and Italy, which everyone remembers, and Italy won it.

The year after that, Barcelona had 30% more Italian visitors, and there was no reasonable explanation for that other than the fact that all the Italians who had seen the match on television in Italy wanted to take a look at the place and the stadium where their home team won that game, and afterwards, on another pitch in Madrid, it won the World Cup.

This clearly demonstrates what I am trying to say, and it happened all over again when the European Cup final between Manchester and Bayern of Munich was held in Barcelona, an exciting, spectacular match which was won by Manchester, and that also meant, without any scientific explanation, that the following year lots of people from Manchester, precisely, wanted to visit the city of Barcelona and take a look at the stadium where their team won the European Cup.

And I could give you plenty of examples like this to demonstrate the importance of sport, whether it is club matches or events organised by the federations, or the staging of national or international events, as regards tourism.

What could happen in future to that trend? I don't get the impression that television or the fact that people can follow sporting events at home will stop people going --with the excuse of Olympic Games, a World Cup match, a match, whether it is football or any other sport, or a championship, whatever the sport – and missing the opportunity of visiting a city to see the event live. Television, in my opinion, won't make things change.

So what will be the cause of it? Something that in my opinion is vital to maintain in sport, and that is the passion and the feelings that people have for their team, either as a club or for their country, if their team is taking part in a competition as a country. This, I think, is the most important thing. And it is here where a real effort needs to be made so that all those regulations that the European Union wants to bring in to make it easier for sportsmen and women to move from one country to another, or from one club to another ... which could end up making people lose --eventually, and goodness I hope it doesn't happen-- the passion and feelings that make people continue to visit a city when an important event is being held there, and which could provide them with a double excuse: the excuse to watch the event and the excuse to visit the city.

It also goes to say that cities that want to combine tourism and sport will have to do more than just organise great sporting events and have great clubs to attract those events and stage matches that attract supporters of the opponent team.

The city has to try to look for more options for visiting tourists or people visiting the city with that excuse. I believe that a city that wants to carry on thinking that the sporting event is sufficient in itself, is mistaken, and for that reason, in this case, in our city, Barcelona –and I hope that those of you who have come here today or on this occasion, to spend a few days here on account of this conference, will vouch for the fact – we are trying to make sure that those alternative options do exist, and that you can attend, in this case, a conference, work and take in what is said, and at the same time enjoy being in a city that is equipped with infrastructures and with leisure activities, to make you feel comfortable. And what is more, you can't make those 90 minutes, or the moment or hours that the sporting event lasts, the only justification for the people who come to the city for sporting reasons but have many other hours to fill, so the city should occupy those hours, offering other attractions, whether cultural, city or tourist-orientated, and which justify the fact that there are two reasons for visiting the city.

So you've been listening to someone who is delighted to think that tourism is, without a doubt, one of the major beneficiaries of sport, not to mention the fact that people can play and practice sport; that young people can, and less young people too. Despite all these other factors, sport helps our industry, the tourist industry, very significantly.

The figures speak for themselves. History goes to prove it and in that history, Barcelona is, beyond a doubt, an exception and that is the reason why I think I have been asked to take part in this Conference today, to say what I have just said and, if you wish, to answer any questions you want to ask about this matter.

Thank you very much.

The Memorabilia Business

Manfred Bergman,

WORLD ASSOCIATION OF OLYMPIC
MEMORABILIA

The memorabilia market (souvenirs, relics and related objects) is enormous. Unfortunately, it is impossible to make a global assessment of this market, since items of memorabilia are so varied and in many a case never registered or put into statistics. The Commission of Olympic Collectors, which governs memorabilia has and is sponsoring research and classification of the marketing aspects of some of the memorabilia. Luckily we do possess some numbers which can give an idea of the size of the market and we shall mention them later on. I shall dwell mainly on the factors, which govern our research and where to look for assessments.

1. "SPORTS TOURISM" - A GROWING INDUSTRY

One facet of the tremendous growth of "TOURISM" is "SPORTS TOURISM".

The latter may be classified as follows:

"Active tourism", by which is meant that the main purpose of the trip is sports: whether for pleasure (winter sports for example), or for one's profession (football or tennis players for example) in this category, one ought also to include trips or vacations in which sport is only part of the trip (cycling, "Club Méditerranée", and the like).

"Passive tourism", by which is meant that the "tourist" is travelling to see a sports event, a spectator (e.g. a football match, a championship, a world cup event, the Olympic Games).

2. "MEMORABILIA" - THE COMPANION OF TOURISM

"Memorabilia" as defined today (the original meaning was different) are all the objects that are connected in one way or another with tourism and remind one of the trip - in fact the "MEMORY" or "SOUVENIR" of the trip. "Memorabilia" can again be classified in the following manner:

"Automatic or coincidental memorabilia":

- i. **the advertisement or brochure or leaflet for the trip**
- ii. *all the travelling documents*
- ii. *travelling attire and baggage*
- iv. *invoices of all sorts (hotel, food etc.)*
- v. *other,*

"Intentional memorabilia" - made or bought during the trip by the "active, amateur and passive tourist":

- i. **pictures taken (photography is the largest and biggest hobby in the world)**
- ii. **pictures or postcards bought and the stamps for such postcards**
- iii. **programmes of the events seen or participated in**
- iv. *pins, badges, ribbons etc.*
- v. *coins, tokens*
- vi. *neckties, scarves, cufflinks, caps etc.*

"Intentional memorabilia" - made by or for the "active, professional tourist":

- i. *all the above*
- ii. **"accreditation or identification" labels, attire, tunics**
- iii. *pins, badges.*
- iv. *awards (cups, medals or other)*

"Intentional memorabilia" - made by or for all the officials that accompany the "active, professional tourist" or that manage or direct the sports events:

- i. *same as above*

"Artefacts, mobile memorabilia" - which are part of the sporting event:

- i. *balls (of any kind)*
- ii. *torches*
- iii. *relay batons*
- iv. *any other artefact*

Items made or published after the event and "collected" by the active or passive tourist:

- i. *newspapers*
- ii. *books*
- iii. *catalogues*
- iv. *audio-visual items*
- v. *stamps*

All of the above items are made or produced or distributed by a plethora of industries, organisations and groups. The market is tremendous, think merely of photography, stamps, postcards etc., not to speak of the memorabilia connected with the "carriers" the "organisers" and the "accommodations" of the tourists. Let me give you some numbers now:

MEMORABILIA AND THE OLYMPIC GAMES

ITEM	AMOUNT	BUDGET	PERCENTAGE	WHOLESALE/ RETAIL VALUE
TOTAL LIC. PRODUCTS 1992	1.534 BILLION PESETAS	195 BILLION PESETAS	79%	15.34 BILLION 30.64 BILLION
TOTAL LIC. PRODUCTS 1996	35 MILLION \$	1.7 BILLION \$	3%	350 MILLION \$ 700 MILLION \$

OLYMPIC COINS/STAMPS/PINS

ITEM	NET AMOUNT TO IOC	NET TO NOC/OCOG	WHOLESALE PRICE/COLLECTOR	TURNOVER (PUBLIC PAID)
CENTENNIAL COIN PROGRAMME	1.5 MILLION \$	1.4 MILLION \$		50 MILLION \$
SYDNEY COIN PROGRAMME	2.5 MILLION \$	20 MILLION AUS \$ (INCLUDES IOC)		150 MILLIONS AUS \$
STAMPS/ GENERAL	0.5-20% OF BUDGET			50 MILLION \$
PINS/SYDNEY ~ 6 MILLION		3 MILLION AUS \$	24 MILLION AUS \$	48 MILLION AUS \$

3. THE "ACCUMULATOR" AND THE "COLLECTOR"

Accumulation or collection starts the moment the tourist has acquired or received one of the objects classified above. The object can now start its journey and go to various destinations:

It is thrown away or left somewhere

It is sent to somebody (mailed)

It is given away

It is sold (directly or through an auction)

It is kept. This last category is the one that interests us the most, and today represents the largest destination of memorabilia.

- i. The owner just keeps them and puts them anywhere, without classifying them and in many cases without trying to obtain similar objects. He is the "Accumulator" of memorabilia. He may stay this way or develop, with the accumulation of many other items of memorabilia, into
- ii. The real "Collector" of sports memorabilia. Many of the owners immediately become "Collectors".

4. THE REAL FUN STARTS-COLLECTING SPORTS MEMORABILIA

Collecting Sports/Olympic memorabilia is a hobby, sometimes becoming a profession, a fascinating pastime, but today a cultural part of Sports/Olympics. It is a new and interesting way of telling the history, the legacy and the heritage of sport (mainly the Olympic Games), and with the exception of stamps, in three dimensions. The majority of collectors become members of specialised clubs or associations, which, in turn, are organised today by the 100 Commission of Olympic Collectors in three federations:

The International Federation of Olympic Philately (FIPO)
 The International Federation of Olympic Numismatics (FINO)
 The International Olympic Memorabilia Federation (FIMO)

Organised collecting breeds and generates many things:

Editing and publishing of catalogues and research articles
 Exhibitions
 Fairs
 Trading: see further on.
 Buying and selling: see further on.

5. REGULATING, "FRAUDULENT" AND ILLEGAL MEMORABILIA.

5.1. Nowadays the production of memorabilia (stamps, coins, pins) necessitates regulating and controlling, otherwise production becomes too large and too expensive, pushing away old and new collectors.

The postal authorities must follow rules to be found in the Olympic Charter to be able to use Olympic markings

The mints must do the same; only mints authorised by the 100 and FINO can produce (Olympic) coins

Pin may only be produced by licensed manufacturers

5.2. The collectors clubs, associations and federation must appoint "investigators" to discover and fight fraudulent and illegal productions.

PRIMARY AND SECONDARY MARKETS. The primary market is the one that deals with the value of the items bought or received. The secondary market is the value of the memorabilia once sold to other persons.

6. TRADING, BUYING AND SELLING OF MEMORABILIA

6.1. The size of the market

I surfed a few days ago on Internet and looked at the articles sold by Ebay (the largest auction house on Internet) in the category SPORTS & TOURISM. There were 13,000 articles on Ebay Germany and more than 600,000 on Ebay USA. Out of the latter, 500,000 were memorabilia

of all sorts. This represents a value of \$ 5 million, out of which 100,000 items are sold every week. One can find even more in other categories. This is the largest, but not the only trading, buying and selling site by far. Thousands exist.

Another way to estimate the market (just for pins) is the tremendous sales made world-wide (but most in the country of the organizing city) in the years before the Games, and the marketing efforts of the producers. It really started in 1980 (Lake Placid), grew enormously in 1984 and became one of the largest industries in 1992 and 1996. Before Sydney tens of millions of pins were sold. And the fight for market share has already started for Athens.

Trading during the Games also attracted large crowds from 1984 and regulating became necessary in 1996.

The sponsors of sport events have recognised the potential of the market - consider the pin industry just by Coca-Cola.

THE ORGANISERS' INTEREST

There is no doubt that the organisers of the sports events and sport tourism are highly interested in our memorabilia. The income is enormous and in many cases help to balance the costs. In some cases there is a huge profit: the post, the mints, the OCOGs etc.

7. THE FUTURE:

Tourism grows because of:

Cheaper travelling

Aging of the population and more travelling by elderly people

More vacation days

Opening of the frontiers for many countries. Think simply of China. Two years ago you could count Chinese tourists to Switzerland by the hundreds; last year there were 50.000. Not to mention Chinese tourists to Asian countries, to Australia and the USA.

More sports events

This means that the sport memorabilia market will grow accordingly.

In conclusion, I can say that the sport memorabilia market is tremendous and growing. The value of the items multiply as they change hands again and again. I have seen memorabilia change four hands in ten minutes and its value multiply by four.

This conference came too early for us. Next time we shall be better.

MANFRED BERGMAN is the Coordinator of the International Olympic Memorabilia Federation and Head of the Philatelic Area of the Olympic Museum in Lausanne, Switzerland. A medical doctor by profession, Mr. Bergman studied in Geneva and London. He attended his first Olympic Games in 1936 in Berlin at the age of 8 and has been collecting memorabilia ever since. He is also a fellow of the Royal Society of Philately in the United Kingdom.

Sport as a Part of Leisure Tourism

Henri Giscard d'Estaing

DEPUTY CEO OF CLUB

MEDITERRANÉE

INTRODUCTION: DEVELOPMENTS AND CHANGES IN THE PRACTICE OF SPORT

Sport has undergone considerable development since the end of the Second World War.

More than half of Europeans engage in sporting activities over the course of the year (69% in Germany, 74% in France, and 82% in Great Britain), with one-third engaging in intensive activity on a regular basis.

Women's involvement is on the rise in European countries as a whole, and participation in sports start early (infant swimming classes) and lasts longer (the number of people over 50 years of age who engage in sports is increasing).

Thirty years ago it was mainly competitive sports that were played, mostly by teenagers, but today sport activity has spread through all social strata thanks to extensive media coverage.

MEDIA IMPACT

The media coverage of sport and major sporting events has led to the discovery of previously little-known sports, especially by young people.

This has given rise to fads, a search for new sensations in sport, and a trend to try all kinds of sports.

As a result, young people (in particular) zip constantly from one sport to another, thus weakening single sports facilities and leading to a drop in the number of members of sports federations.

Socially, sports are played at all times, by all classes, and in the framework of all institutions and are present at other levels of society as well: clothing, communications, role models.

There is a growing pursuit of shared experience in the practice of sports that is associated with greater freedom and independence in the organization of sporting activities.

These new expectations of sport are well suited to sports activities during holidays, leading to an increase in demand. Over the past forty years, a dynamic link between sport and tourism has been growing continuously, rooted primarily in the emergence of the leisure society that has succeeded the consumer society.

SPORT AND HOLIDAYS

Holidays are:

A time for escape, for discovering the world, other people, countries, and cultures; and a time for renewal (e.g. the positioning of the Club Med brand), that is, a special time for self-discovery, for getting back in touch with oneself and getting in touch with others, for trying new things, for getting back in physical condition and for playing sports.

Why sport?

It is an essential means of renewing oneself, holiday time nowadays being, above all, a time for self-improvement and for benefiting from a break in the yearly routine.

Taking part in sports is certainly easier on vacation: it is a good time to do so and is one of the benefits of rediscovery sought by holiday-makers.

Sports tourism is enjoying a boom in line with social trends strengthening self-involvement and a desire to get back to nature.

Thus, sports tourism has emerged, at the same time, as a factor underpinning tourism development, a means for local development, and an economic motor.

By combining tourism with the development of sports tourism, its economic potential is helping producers to better structure supply, while at the same time better identifying demand. Still, sports tourism demand is poorly defined in statistical terms, because it is quite variable and information gathering mechanisms are non-uniform and haphazard.

The upshot is that sports tourism's modalities offer the travel sector an opportunity to diversify its clientele.

A SPORT-BASED TOURISM STRATEGY

Sport as a reason for choosing a vacation.

Sporting activity as a vacation component.

Besides seeking escape and a break in their daily routines while on holiday, tourists also use sporting activity as a means of relaxation and as an opportunity to discover new sports (to engage in a sport they have never had a chance to try in their everyday lives).

SPORT AS A REASON FOR CHOOSING A VACATION

In the 1990s, as a result of the reigning unwholesomeness and stress of day-to-day living, new demands have come into play based on discovery, adventure, and the genuine experience of "nature sports" destinations.

The number of agencies specializing in special travel, sports travel, and extreme sports travel is increasing (e.g., trekking in Nepal). Sport has become a destination in itself among tourism resorts, which by their very nature play a role as “sports partners”: skiing, water sports, hiking, cycling, diving and golf.

At Club Med:

Eight resorts specializing in diving offering a range of different activities (free diving, beginners, buddy diving), plus sports-based events: free diving World Cup in Ibiza organized by U. Pelizzari.

Sixty golf resorts offering “Club Med Golf” classes, a method based on practical movements used in such other sports such as tennis, judo, and fencing.

Fitness: Special programmes at certain resorts offer activities designed by the famous “Les Mills” academy.

Tennis: Nine resorts offering Club Med-ATP Tour classes.

Clientele: Dedicated sports practitioners, fans.

Advantage: Well-defined target clientele.

Disadvantage: Narrow target group.

Furthermore, while there is a demand for technical mastery, teaching is hard to sell. Therefore, the services being offered should play down any learning difficulties and instead focus on the “fun” aspects.

Identification of a target sport allows specialization, though it is subject to the drawback of narrowing.

The seasonal nature of demand is a factor, but this can be overcome by making use of the different seasons at different destinations around the world.

SPORTING ACTIVITY AS A VACATION COMPONENT

Sport, as part of a holiday programme, is a factor contributing to a vacation’s primary goals: relaxation, leisure, and renewal.

As a result, sport in that spirit has taken its place in the framework of the tourism economy and has turned into a full-fledged economic activity.

Sports clientele is made up of people who take a relaxation-leisure-discovery approach to sport. Furthermore, such people will take part in both the traditional sports that have become popular today (mainstream sports) and the newer, emerging sports, sports with infrastructure and equipment requirements that make it impossible to practice them other than in the specialized, dedicated conditions offered by tourism resorts.

Mainstream sports:

Skiing: rate of travel by the French to mountain venues, 8%; the Swiss are the largest consumers of mountain travel (which accounts for 23.6% of all travel by the Swiss); water sports: four million participants; 60% of Frenchmen have taken part in a water sport and development has been promoted by the media coverage of big races such as the Vendée Globe and The Race; tennis; golf.

Emerging sports: thrill sports

Gliding on snow: big air, half pipe; Gliding on water: kite surfing, wakeboarding, funboarding; beach sports: beach volleyball; in-line roller skating (at Club Med).

CONCLUSION**Sport is attractive:**

- because of the values it brings;
- because of the variety it brings;
- because of the fellowship it brings;
- because of the physical fitness benefits it brings; and
- because of the simple enjoyment it brings.

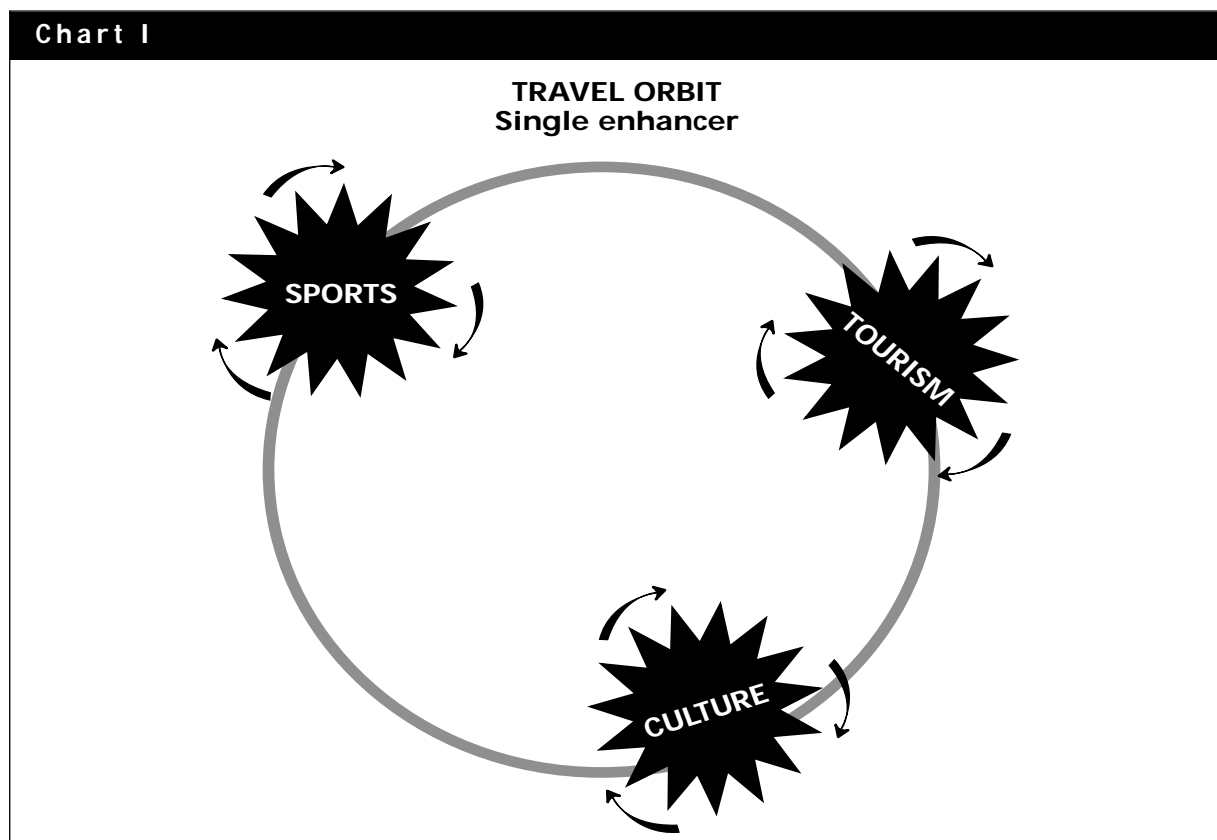
HENRI GISCARD D'ESTAING is the Deputy Managing Director for finance and corporate development of Club Méditerranée—the company that introduced the idea of active sport-oriented tourism to the world and revolutionized the way people take their holidays. Before joining Club Med in 1997, Mr. Giscard d'Estaing was CEO of the Danone Group's mineral water division, responsible for the brands Evian, Volvic and Ferrarelle. He has a masters in Economics from the University of Paris.

Tourism, Sport and Culture

Dr. Joseph Kurtzman,
SECRETARY GENERAL, SPORTS
TOURISM INTERNATIONAL COUNCIL

Three concepts, each distinctive in their own right, with dependency values and inter-dependency characteristics inherent in many societies worldwide, affecting particularly this New Millennium.

Chart I illustrates the plausibility of each concept within its operational framework - and without the need of co-existence, supportive measures and inter-linkages. In essence, each concept is unique and self-sustaining, i.e. the *Single Enhancer*,



The degree of relationship between sport, tourism and culture varies in terms of situational offerings, experiential potentials and associated sensitivities. And without question, these concepts are induced by entrepreneurial marketing tools and discretionary economic cost impacts on individuals, families and group travel decisions.

To better understand this tri-concept, a clarification of the terms are of the essence, as well as pertinent examples embodying the practical elements therein.

SPORT

Sport derives its root definition from "disport" meaning to divert oneself. It carried the original implication of people diverting their attention from the rigours and pressures of everyday life by participating in the "mirth and whimsy of frolicsome" physical activity. (*Zauhar - 1995*) Today, however, sport is often anything but diversion to its active and passive participants.

Sport can be defined in many ways and from different viewpoints or distinctive perspectives. As definitions are mere tools, serving or assisting to specify some level of precision and characteristics, the following have been selected to demonstrate sport activity as a part of our social world:

- To some, sport is amusement or recreation; a pleasant pastime which can be pursued in the open air as hunting, fishing skiing or trekking. Informality is the basis - where sport is free and participation is totally voluntary. (*Coakley - 1982*) Recreational sport is characterized by playfulness involved in enjoyment that serves the primary reason for participation. (*Fraleigh - 1984*)
- Still to others, an imperative feature of competitive sport is that activities, classified as such, are formally structured to a degree and organized within a context of formal and explicit rules of behaviour and procedures. Salient features include some level of competition and physical exertion. In addition, competitive sport, being the formal, rational, goal-directed endeavour provides or allows little opportunity for fantasy or make believe either to or for the participant or spectator. (*Schwartz - 1973*)

Furthermore, the novelty challenge has permeated sports through extreme uniqueness of skill, endurance and unusual situations. As such, categorization of sports ranges from individual to group participants and/or spectators from curiosity seekers to history enthusiasts to pilgrimage groupies.

TOURISM

People's desire for travel is related to their immediate socio-physical environments and the appeal of the beyond. This travel drive is an economic, environmental and sociological force of global proportions. However, there is "considerable debate surrounding the meaning of travel in terms of tourism. Much of this debate is concerned with the desirability of employing definitions based upon the activities that are engaged in or on the experiences that are derived from participation. (*Heath and Wall - 1992*)

To some, tourism usually denotes a form of activity that takes place beyond a specific distance from the home or in a geographic, administrative jurisdiction different from one's place of permanent residence.

Tourism involves the motivation, preparatory experience and expectations of people travelling - the tourist. It also enwraps the anticipations, adjustments and tolerances of the residents - the hosts. And, it engages numerous organizations, agencies and institutions in catering to guest needs, wants and desires. (*Weller and Hall - 1992*)

To others, tourism is construed as the science, art and business of attracting and transporting visitors, accommodating them and graciously catering to their needs and wants. (*Feifer - 1985*) Still, to others, tourism is a means through which peoples may know and understand one another; human understanding being so essential in the world at this time. (*Theobald - 1984*)

Statisticians and market analysts have sought better descriptors for more accurate accounting of tourism visitations. For instance, domestic tourists have been classified as visitors from within the country who stay a minimum of twenty-four hours and not more than one year for pleasure, recreation, sport, business, visiting friends and relatives, missions, conferences, health reasons, studies and religion. International tourists are considered to be residents of one country visiting another for many or all of the same purposes as domestic tourists.

For discussion purposes, general classifications could be as follows:

- tours
- attractions
- resorts
- cruises
- adventure (*Kurtzman - 2000A*)

Evidently, a sub-classification is feasible for each enumeration.

CULTURE

Culture also has multi-dimensional definitions. We have looked to anthropologists for clarification and understanding. The classical definition lies in a complex whole which includes knowledge, beliefs, art, morals, law, customs and other like capabilities and habits acquired by men/women in a society. Culture has also been perceived in terms of folkways, artefacts - meaningful with symbolic relationships. On the other hand, culture is considered to be the organization of phenomenon - or patterns of behaviour reflected in objects and tools enwrapped in sentiment. Culture was also seen primarily as an intellectual process - with meaningfulness for the mind envisioned as an explicit pattern experienced through "autodirectiveness" of artefacts. (*Merril - 1969*)

Hence, in general, culture is intangible - experienced by feelings, attitudes and psychological appropriateness. And tangible in terms of product of human beings that can easily be termed as materials - a materialistic culture.

As stipulated, in the terms of materialistic products, culture englobes some of the following:

- food
- dress
- crafts
- art
- entertainment
- hospitality
- art
- architecture
- dance
- performing arts, etc.

FUNCTIONS OF SPORT

Through literature analysis and conceptual perspective, five basic functions of sport can be isolated, namely:

- The *socio-emotional function*, which also operates at the level of the individual and is concerned with the socio-psychological stability of the individual.
- The *socialisation function*, which also operates at the level of the individual, and is concerned with the inculcation of cultural mores and beliefs, and with the development of personality characteristics.
- The *integrative function*, which operates at the level of collectivity, and is concerned with the harmonious integration of disparate individuals into, and their identification with, the collectivity.
- The *social mobility function*, which has concerns at the level of the individual, the collective, and the Nation/State, deals specifically with the movement of individuals between socially defined categories.
- The *political function*, which is predominately operative at the level of the Nation State, is concerned with the function of sport as a political instrument. (Stevenson and Nixon - 1972)

Further exploration with respect to sports functions upholds that sport builds character, teaches values, encourages healthy competition, provides outlets for aggression and promotes international friendship and understanding. (Fox - 1982) The modern Olympic Games, re-established by Baron Pierre de Coubertin, was founded on the belief that sport brought people together and in doing so contributed to a better understanding between peoples and nations. (Bannister - 1981)

Generally speaking, the contribution of sports to the active and passive participant is widely recognized and accepted. The nature and content of sports does vary. (Butler - 1950) These fluctuations are dependent upon location, interests, facilities, traditions, climate, type of organization or entrepreneurial enthusiasm and the like. Other differentiations are contingent upon the quality levels of sports experiences - informal, formal, recreational or competitive. (Kurtzman - 2000A)

FUNCTIONS OF TOURISM

Worldwide, tourism has in recent decades become firmly established as a major industry providing significant economic and employment benefits. For example, in Australia tourism accounts for 8% of employment and 5.3% of the Gross Domestic Product and nearly 15% of Export Earnings. As well, forecasts for Australian inbound tourism are very strong. (Commonwealth of Australia - 2000)

There is, in some instances, the combination of interaction and phenomenon resulting from travelling and staying by non-residents, given that they take up residence and do not engage in any profitable business. Tourism, is therefore, the combination of professional activities related to transport, accommodation, provisions and leisure activities offered to a tourist. (Government of Mozambique - 2001)

The generally perceived importance of tourism for economic development reasons cannot be disputed. Statistical evidence depicts a remarkable increase in the number of international travellers from 25 million in 1950 to 425 million in 1990 (McIntosh et al. - 1995) - and over and above this figure in 1997. As such, tourism is a significant strategy for capital accumulations. Furthermore, current developments in international tourism markets - as well as domestic and national tourism - show increases in many countries. The reason for travel may be different from the purpose. For instance, "one may need a rest" or "the advertising was persuasive", or simply "to accompany a friend". Mere explanations do not necessarily clarify the intention or resolve for travel.

FUNCTIONS OF CULTURE

Culture has particular qualities that are revealed directly or indirectly through:

- knowledge (life expectations)
- transmission (benefits)
- social (expression)
- idealism (content)
- gratification (satisfaction)
- adaptability (changes)
- integration (acceptance)

These qualitative composites can both be productive and repleting.

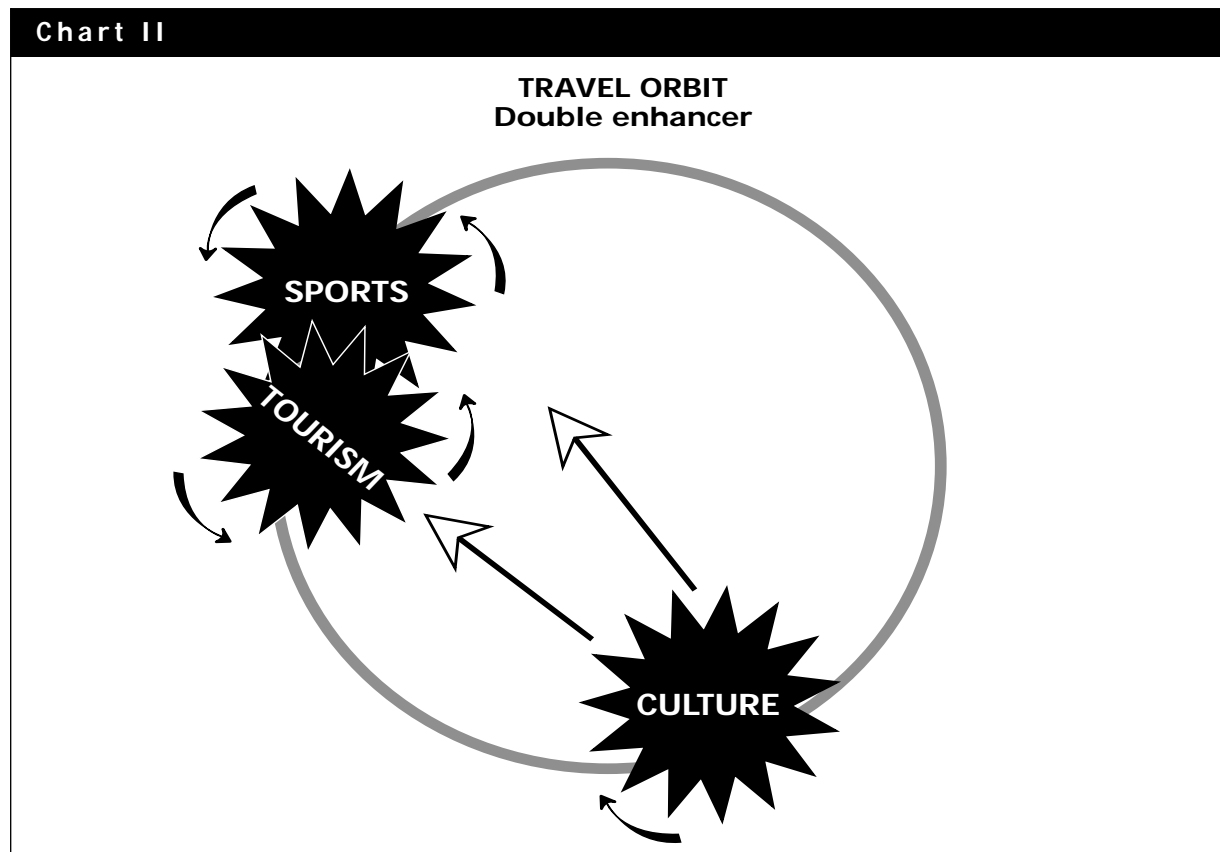
Society and culture are an integrated "mesh". One could be disassociated from the other. In contrast, materialistic products are tangible elements that inherently are identified, associated and delineated.

Tangible aspects of culture are not necessarily measurable in terms of impact and retention. Tourists, without question, with inferences of human values, experiences and lifestyles have the option to:

- expound their domestic sensitivities;
- accept destinational traits and characteristics;
- adopt, in part, or in whole, certain cultural aspects;
- alter/modify definite features of touristic experiences.

SPORT AND TOURISM PARTNERSHIPS

Chart II demonstrates the possibility and plausibility of co-existence whereby two concepts (example: sport and tourism) interact supporting one another - and without the necessity of a particular limitation, contribution or emphasis, i.e. the *Double Enhancer*.



The term *sports tourism* has been coined to better understand the use of sport as a touristic endeavour. Moreover, in the last decade or so, there have been philosophical and entrepreneurial developments that contribute to such a marriage actuality.

The *sports tourism* phenomenon has been exhibited, manifested and marketed through and by worldwide sporting events such as the Olympic Games, World Championships and the like. (Bhatiz - 1991)

The potential significance of the massive nature of sports tourism produces an upsurge in spectatoritis and prevalency in hero-worshipping and stalwarts. (Kurtzman et al. - 1993).

In developed countries, the concept of health through physical activities at all age levels sparked renewed interest in a variety of sporting activity participation. (Pigeassou - 1997)

There exist important affiliations between sport and tourism in promoting domestic, national and international friendship and understanding amongst individuals, groups and communities. (Research Unit - 1995)

Future projections, with respect to tourism trends, indicate a tendency pattern of breaking free time into a series of blocks, thereby, permitting a variety of experiential stays within a single year. (Gunn - 1988)

Different forms of tourism can be defined in terms of the kind of leisure mobility undertaken by the tourist and could well be identified as follows:

- adventure tourism (reality experiences)
- incentive tourism (productive motivational techniques)

- cultural tourism (vestige of lifestyles)
- heritage tourism (glories of the past)
- marine tourism (water-oriented activities)
- festival tourism (diverse celebrations)
- leisure tourism (away from work time)
- ecotourism (experiences of alien sceneries)
- educational tourism (site visitation learning)
- wilderness tourism (related to nature)
- sports tourism (physical activity focus).

Oftentimes, sports tourism is categorized directly or indirectly through a value system related to economic impact. The primary qualifier for the determination of sports tourism is the destination focus directed to sporting activities, through marketing strategies and provision for a sports programming milieu. On the other hand, tourism destinations whose sport activities are “peripheral” to their focus and marketing efforts are considered to offer sports programmes and activities solely for a “supportive” role acting as a “retention” factor for the respective destination.

As such, it is also imperative to provide a foundation for defining “sports tourism” through the nomenclature of actual sporting activities rather than by philosophical definitions. Thus, sport and tourism are distinct in that there are several differences in the types of activities, modes of transportation, location of experience and “polarization” appeal - and allurements to and for the tourist. On the other hand, these approaches do have a degree of similarity in the fact that each category is sports related with an enthusiastic touristic followership, be it participative or non-participative. These relationships were categorized into six unique areas mentioned above viz. adventure, attractions, cruises, events, resorts and tours. (*Kurtzman - 2000B*)

TOURISM AND CULTURE PARTNERSHIPS

“Community regardless of race, creed, culture, language and geographic territory, refers to “people” (*Stoneall - 1985*) ... people living in physical space; people circumscribing social relationships; people sharing common and conflicting interests; and people embracing and expousing collective solidarity; be it a philosophical, physical, emotional, economical or numerical sense. (*Arensberg and Kimble - 1972*)

In essence, “people of a community” partake, meet and participate in day-to-day living and lifestyles in terms of mutual interrelationships, sustenance and trust. This “community” symbiosis is reflected, in great part, in activity provision of political leadership, religion, education, health, social service, protection, work economy and sports through artefacts. (*Defleur et al. 1971*)

Worldwide community populations range from a few families to thousands of people. Their external boundaries, vague or precise, formal or informal, affect their levels of community interpersonal and intergroup relationships - directly or indirectly. (*Merril - 1969*)

Tourism and culture covers many aspects of travel and travel motives. People learn about each other, their lifestyles and thoughts. In this sense, tourism is an important and vital “way and means” of promulgating and promoting cultural knowledge and relationships. In addition, cultural elements, of any society, are sound and perhaps expedient resources to attract visitors.

In many geographical areas of the world, culture and tourism are linked with distinctive governmental policies, thus, enhancing the promotion of knowledge, understanding and respective societal image.

For this, countries, market cultural factors such as entertainment, food, drink, hospitality, architecture, craft products, performing arts and other aspects of their particular or peculiar way of life.

Successful tourism and culture is based on presenting a societal national flavour - in projecting favourable and positive images as well as benefits, offerings and enjoyment.

In the New Millenium, where there is a dire need to encourage cultural diversity, improve relationships and peace, the following play an active and dominant role, particularly where sport is the underlying element or facet:

- libraries
- museums
- exhibitions
- halls of fame
- walls of fame
- films
- television
- radio
- musical performance
- study tours
- dramatics
- dance
- conferences
- seminars, etc.

Thus, diversity of activity destinations provide opportunities and motivational aspiration for people of different regions, countries and continents to travel - to get to know one another - each other.

Purposeful activities or destinations particularly those that cater to tourist interest and curiosity, are becoming readily acceptable and recognizable. The scope and type of educational pursuits and endeavours related to sports can be pre-arranged or organized or left to travellers' discretion.

Examples of such touristic achievements are multiple. For instance, sports museums offer cultural exhibits relating to sports in paintings, sculpture, graphics, arts and facilities depicting sports as well as athletic achievements of past and present. Moreover, memorabilia, souvenirs, and the like featuring displays attract travellers. Other forms of crafts, music, dance, etc., may supplement such attraction features - giving opportunities of enjoyment and entertainment leading to a better comprehension of respective societies.

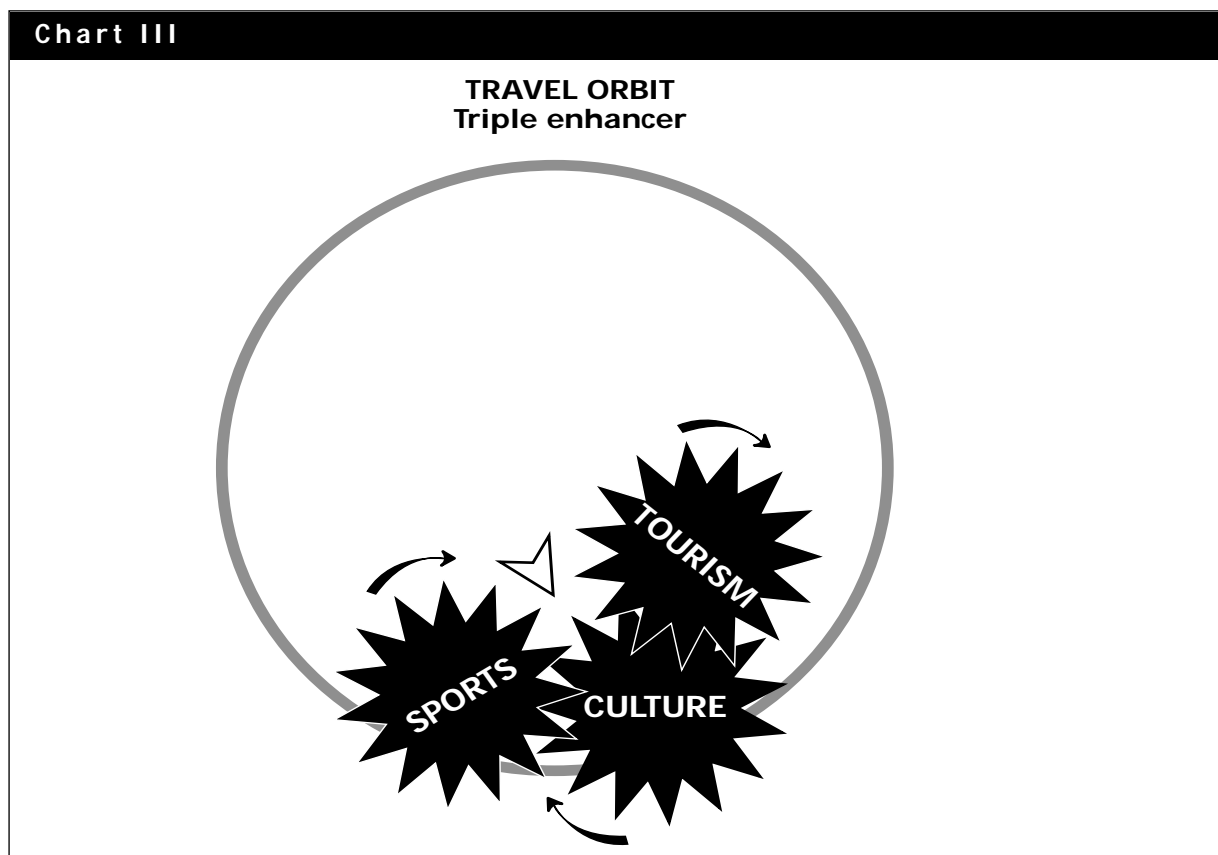
Above all, the philosophy of the Olympic Movements Ideals touch upon:

- Cultural Heritage
- International Understanding
- Sport as Education (Le Clair - 1992)

Travel study programmes related to sports can be particularly informative and valuable experiences. And the cultural heritage aspect is often expressed in historical resources. As mentioned earlier, their preservation of sports history is found in museums - be it in specialised exhibits, special events or festivals or thematic expositions. Halls of fame also tell the history of sport - focusing attention on sport peculiarities.

Valued information on historical perspectives of sport are found worldwide - Rome, Mexico City, London, Moscow, Lausanne, Paris, Ancient Olympia, etc. The interrelationships of diverse and different cultural backgrounds, approaches, presentations, exhibitions, stimulate travellers to focus and better understand the lifestyles of people - of the world.

Chart III depicts reality whereby operational offerings include the three concepts intersecting, integrating and contributing to virtual success, i.e. the *Triple Enhancer*.



SPORT-TOURISM-CULTURE

Human interactions are usually reconcilable by certain mutually acceptable actions - that is by interpretation and balance between stimulus and response. As such, specific or symbolic behaviours give meaning to sport, tourism and culture. Conditions springing from actions take into account opportunities, means, demands, discomforts, impositions and the like. Decisions are based on the assessment of these factors - be it by the individual, by the collectivity or societal quest. Furthermore, decisional behaviours are defined or structured in terms of business procedures, holistic conditions or mediated interpretations - in essence, an interactionist approach to the tri-concept. (Kurtzman and Zauhar - 1999)

TRAVEL MOTIVES

Entrepreneurs, operators and managers of the sports tourism and culture industry, without question, appreciate knowing what motivates their consumers. Unfortunately, many consumers are not fully aware of their motives. Often, the subconscious mind dulls or submerges one's desires, urges feelings and emotions. As such, motives and desires may be difficult to identify.

"Motivation is a force within an individual which causes him or her to do something to fulfil a biological need or psychological desire." (*Fridgen - 1971*) These drives cause and regulate behaviour directed towards achieving goals. They do operate independently. Yet, occasionally, both could be simultaneously or concurrently satisfied - as in the case of a ski resort where skiing is combined with socialization.

Motivation to travel or to participate in some form of sport, tourism, culture might also be defined as that set of needs and attitudes which predispose a person to act in a specific goal-directed manner.

Here, attitudes could be interpreted as overall tendencies to respond positively or negatively to particular people, objects, situations or milieu in a way that is learned through experience and made-up feeling. Motives, on the other hand, could be described as a state of tension and complex disposition controlling behaviour towards travel goals. Nevertheless, motives do have direction, momentum and intensity. (*Settle and Alreck - 1986*)

Consumer motives determine what people want to do or want to have and the extent to which - they want to do it or have it. When consumers see, feel or perceive a connection between their needs and the product or service offered, incentives to follow up develop. Evidently, the greater the need, the greater the incentive. And this need incentive correlation is induced through direct or indirect methods or approaches ... directly based on promotions and advertising primarily; and indirectly on personal consumer experiences.

However, consumers do evaluate their incentives in terms of value for money and experiences to be gained or relived. The value results improve consumer motivation and legitimize their desires and worthiness of the sports tourism cultural endeavour. In fact, both short and long-term motivation usually guides a traveller's behaviour. A weekend sports festival experience may incite a sport tourist to return the following year - a short-term motivation. Long-term motivation for high mountain climbing would include practice on lesser peak summits and intense preparatory sessions. For sports culture tourism, the degree of consumer values dictate goals and strategies for reaching desired leisure pursuits.

Based on literature review, five personality parameters were identified reflecting on core consumer values, (*Settle and Alreck - 1986*) which have transferable applicability to sports, tourism and culture.

ECONOMICALLY ORIENTED CONSUMER

This tourist places great emphasis on economy, luxury and well-organized activities be they sport, culture or tourism or a combination. Additionally, tourist interest lies in activity knowledge to be gained. A prime example of such a person would be an individual vacationing at one of the top ski resorts where lessons, skiing, amenities and accommodation refinements are available; or consideration given by a traveller to attend the opening spectacle of a sports festival.

INTELLECTUALLY ORIENTED CONSUMER

This vacationer appreciates aesthetics, comparisons and contests, particularly in highly skilled athletic performances. He or she analyses, contrasts and studies particular movements and strategies. An example could be a sports tourist spectator viewing an Olympic gymnastic event, or the traveller who tours sport facilities with the intention of comparing lifestyles, amenities and architecture.

SOCIALLY ORIENTED CONSUMER

Social values are the basic motives for such a traveller-consumer. The love of people, the affiliation rapport, the social interaction and cooperative spirit are the main characteristics. Sports exhibitions, contests and/or competitions are not necessarily the primary focus interest. An example of such a consumer would be a sports tourist golfer who as a participant would travel to St. Andrews Golf Course, Scotland to enjoy the social contacts, the programmed leisure activities and historical environs.

POLITICALLY ORIENTED CONSUMER

For sport, culture and tourism, the importance of participation or presence is highly influenced by status, power, sport icons and symbols. At times, the value is dependent on personal contact, association or residual influences. "Come ski where the Olympic heroes competed" is an example of such consumer orientation. Another example would be to travel to the official opening of a sports heritage site where politicians and sport celebrities would be attending.

COMPLEMENTARY ORIENTED CONSUMER

The drive and motive here for the complementary oriented consumer is a combination of two or more "core" consumer values in varying degrees. Nevertheless, there is basic affinity for sports travel. For instance, a traveller may attend a professional baseball game for different reasons - social atmosphere, autograph sessions, skill appreciation, strategy analysis and because it is the "in thing to do". Also, a sports tourist who combines visit/participation within a particular geographic region or urban area to become more familiar with local folklore, art, etc., would be another example.

TRAVEL PERSONALITY CHARACTERISTICS

Early research found distinctive travel personality traits with two extremes - namely the allocentric and the psychocentric. The former was seen as the trendsetter, the challenger and the courageous person who wilfully desires to be the first traveller to a new destination, setting or environment. In effect, the allocentric tourist could be referred to as a "leader". An example would be the tourist to first experience paragliding or kayaking down a historical river.

The psychocentric, on the other hand, is a "follower" who prefers to travel to familiar and safe touristic areas after some family member or acquaintance have already visited. An example would be the traveller who paraglides long after the sport has been introduced. Another example would be the VFR situation, where relatives strongly suggest a visit to a local sports photography gallery. (*Plog - 1991*)

CONCLUDING REMARKS

In conclusion, the sport tourism culture process relies heavily on the traveller's:

- awareness
- interest factor
- desire factor
- action factor

To the degree that each factor impacts a particular *Single Enhancer* or a combination of *Enhancers* determines the potential satisfying experiences. One might suggest that - the more informed the traveller - the more that knowledge will guide him/her to a particular destination that will fulfil needs, wants and desires.

Hence, the stronger the tri-concept affectation, the better and greater the retention values and economic success.

Resultantly, linkages between sport, tourism and culture must be encouraged, developed and promulgated for the betterment of individuals, groups and society.

*In his capacity as Director General of the Sports Tourism International Council and Editor of the Journal of Sport Tourism, **JOSEPH KURTZMAN** is an advocate for the development of this field-both as an academic discipline and as a profession. His background includes teaching sport management at the New York State University, Ithaca College and the University of Ottawa, as well as teaching tourism management at the Monterrey Institute of Technology in Mexico, Algonquin College and the Canadian School of Business. Mr. Kurtzman is a licensed travel agent and member of the Canadian Travel Agents Association.*

Tourism, Sport and the Environment

Prof. Peter Keller

TOURISM CHIEF, STATE SECRETARIAT
FOR ECONOMIC AFFAIRS,
SWITZERLAND

TOURISM AND SPORT, REFLECTIONS OF CIVILIZATION

The people and administrations responsible for tourism and sports development must, ineluctably and of necessity, give consideration to ecological issues. These two key sectors in today's leisure society are sources of environmental damage. They are mirror images. Tourists and sports practitioners, tourism facilities, and sporting events are clearly identifiable by the public. Adverse ecological consequences are therefore readily ascribable to tourism and sport. The people who profit from these forms of leisure are not ordinarily the same people who suffer the environmental consequences. For that reason, political conflicts frequently centre on the ecological compatibility of sport and tourism.

Still, it would be unfair to label tourism and sport "environmental scourges". They are simply a reflection of modern civilization, which very often is incapable of avoiding the wastage of resources and environmental pollution following in its wake. If projects are to be properly managed, sports and tourism have to concern themselves with environmental issues not only to make them acceptable to both public opinion and the authorities, but also, above all, because an intact environment is fundamental to both these sectors. The quality of the environment is indeed critical to major motivations underlying tourism and sport, such as relaxation and health. A holiday-maker will not be attracted to dreary scenery, a runner needs pure air.

NEED FOR ADDITIONAL AREA FOR HABITATION AND TRANSPORT

Tourism and sports have become cornerstones of our society. The economic importance of these two activities has been calculated empirically, but it would be wrong to silence the ecological cost of these achievements. Spatiotemporal concentration of tourism demand and the accompanying construction and amenities require alteration of the environment. The widespread interest in sports has a similar effect.

In fact, tourism and sport tend to be built on existing transport and tourism infrastructure, which contributes to greater density. This coverage and obstruction weigh sporadically, but often heavily, on the landscape, the locality, and the environment. It is well-known that infrastructure capabilities of tourism areas must be able to meet the peak needs of the high season. Chamonix, the biggest tourism resort in the Alps, has a population of 10,000 inhabitants. However, during the high season, around 100,000 people sojourn to the foot of Mont-Blanc. The same can be said of Orlando or Benidorm, Paris or Rome.

Viewed from the standpoint of the territory of a given country as a whole, surface area usage by tourism and sport is relatively minor. For instance, in Switzerland, a country specializing greatly in tourism and sport, only 1% of national territory is given over to tourism or sporting facilities. In other words, 55m² per inhabitant. In highly developed, densely populated countries it is leisure-related travel that is the problem. In Switzerland, 50 % of private transport, or 50 thousand million person kilometres, can be chalked up to tourism or sporting activities.

The additional load placed on land for habitation and transport by tourism and sport has increased local pollution. In Switzerland, 27.9% of road transport pollution emissions are attributable to tourism or sport-related transport. The share ascribable to "offroad" vehicles such as motor boats, ski-slope tenders, and snowmobiles is also considerable in all developed countries. A study conducted in Austria has shown that 25 ski-slope tenders emit 12 tonnes of sulphur oxide over a winter, accounting for 25% of the total air pollution caused by tourism.

USE OF ECOLOGICALLY VULNERABLE AREAS BY TOURISM AND SPORT

Tourism and sporting activities may be carried out both in urban areas as well as in rural areas, close to nature. In the cities, tourism and sport-related pollution is limited and does not reach significant levels except during peak season or at major events. In contrast, the situation is more consequential in areas closer to nature. A study carried out in Belgium showed that damage to the ground caused by two runners in a week was detrimental to forest mushroom growth (Keller, 1997).

Natural landscapes such as beaches, lakes, and mountains are among the major tourism attractions. These attractive areas all exhibit a precarious ecological balance. Human activities have greater repercussions in such areas than in less vulnerable areas. For instance, steep-sided valleys carved out by glaciers in the Alps are more sensitive to air pollution than are plateau regions, because gaseous pollutants remain closer to the ground for longer periods in conditions of weather inversion. This explains why air pollution is often higher at Alpine tourist resorts than in the cities. The situation is similar for the topsoil, which is not as deep in mountain areas. It has been produced over several thousand years, and earth moving activity or hiking trails can have irreversible consequences (Keller, 1981).

TOURISM AND SPORT TRENDS POTENTIALLY ADVERSE TO THE ENVIRONMENT

Intensification of tourism and sport-induced pollution in the age of globalization

The popularization of tourism and the development of popular sports in the developed countries have resulted in an initial surge in the ecological load, with mainly local consequences for the environment. As new destinations have been brought onto the world market, the rate, amount, and intensity of this ecological pressure has increased. Similar effects on the environment are ascribable to the growing specialization and technical requirements of sports and the professionalization of sport. Tourism and sport are on the verge of unleashing a second wave of ecological burdens with environmental repercussions global in scale.

The ecological cost of the exponential growth of tourism supply and demand worldwide is growing. Air traffic, heavily on the rise, is a sensitive indicator of the consequences of globalization. Aircraft use fossil fuels and give off gases. Air traffic has tripled since the first oil crisis in 1973. Today, airplanes burn 200 tonnes of kerosene per year, equal to 13% of world consumption of liquid fuels. Passenger kilometres are expected to double in the next 12 to 14 years (Moller, 2000). There is a clear correlation between intercontinental tourist flows and the concentration of sulphur oxide at 12,000 metres caused by air traffic.

Tourism and sport bear some of the responsibility for one ecological problem: global warming. Two effects are rising sea levels and higher snowlines, which will have consequences for tourism and may drastically alter tourism supply in certain tourism economies, leading to structural changes. In Switzerland the snowline is distinctly higher than it has been in a number of years and the skiing season has grown shorter. A third of cable car companies are having difficulty surviving because of snowfall conditions, which, sooner or later, will force them to close.

It should also be noted that only the developed countries and newly industrialized countries have high levels of tourism and sporting activities and facilities. It is legitimate to ask whether it will be possible for humanity as a whole to enjoy the lifestyle and tourism and sporting practices that are common in those countries. If the inhabitants of a heavily populated country like India, for example, were to practice tourism activities with the same intensity, available oil reserves would be used up in less than ten years and the environmental problems caused would be still more serious.

Industrialization and specialization of tourism and sport

Growing prosperity, the large numbers of visitors who are more and more demanding of comfort and variety in their leisure activities, and the globalization of competition have resulted in the development and industrialization of tourism and sporting supply. Such tourist complexes as resorts, recreational harbours, and skiable land area are getting larger and larger. Elite professional sports require large facilities to hold spectators. Sporting activities require more and more sophisticated and technically advanced equipment. Tourist leisure sports like skiing are dealt with on a mass, industrial basis. Ski slopes are built, tended, and covered with artificial snow, all using technical means, thus becoming the industrial areas of winter sports facilities.

Sports fads are another example of intensive, large-scale use of the environment. These activities are both new forms of leisure tourism and new sports that are developing outside the framework of organized sports. Unlike traditional tourism activities, such as hiking, swimming, and skiing, these new outdoor recreational activities are carried out in the countryside, far from crowds and resorts. Mountain biking, hang gliding, rafting, and helicopter lifts to mountain tops, explore the last remaining outposts of nature. The radicalization and diversification of hard to control sporting activities entail a threat to the flora and fauna in hitherto pristine areas.

The proliferation of leisure parks and large sports complexes, often built in crowded, industrialized areas, are another example of the burden placed by tourism and sport on the environment. These take the form of indoor tourism productions supplementing and competing with traditional tourism amenities, ordinarily affording opportunities for indoor recreation independent of the weather. Today it is possible to learn to ski in roofed facilities

in Great Britain before trying one's skills on traditional ski slopes. In Japan, a huge leisure complex located just a few kilometres from the natural beach offers a fully appointed tropical paradise. These large indoor facilities are often "consumption machines". But they generate traffic problems and normally consume huge amounts of energy.

Growing importance of event marketing for tourism and sport

By means of event marketing economic agents seek to position a destination and thus attain a substantial multiplying effect to generate added value. In the traditional tourism countries, a portfolio of attractive events has turned into a necessity, especially when demand is stagnant. In less developed countries going through a temporary crisis, events can generate jobs and revenues in the short or medium term. Environmental pollution is proportional to the size of the event.

From an ecological standpoint, macro-events cannot be permanent. They are always inherently mobile, and the installations, often erected only while the event lasts, always have large power requirements. A typical problem encountered by this type of event is waste disposal, which cannot be done without environmental repercussions. For instance, the federal gymnastics meet in 1996 lasted nine days and brought together 75,000 athletes, 4,000 judges, and 200,000 spectators, generating 106.5 tonnes of waste, which was burned, producing additional CO₂.

ECOLOGICAL DURABILITY, A STRATEGIC OBJECTIVE OF TOURISM AND SPORT

Environmental responsibilities of tourism and sport circles

Because of the importance of tourism and sport in personal development, health, quality of life, and economic development, promotion of these two sectors is in the public interest, provided that the environment is not harmed. A third way is required, since tourism and sport depend on a sound environment. It is particularly essential to protect the environment in the developed countries, which in fact account for most of the world's tourist arrivals. They also have the largest number of sport practitioners and are the organizers of the largest sporting events.

The international community is fully aware of the impact of environmental issues on tourism and sport. The World Tourism Organization (WTO) has published a series of manuals intended to encourage policies and practices that will protect the environment in the realm of tourism (WTO, 1998). The International Olympic Committee (IOC) attaches great weight to environmental aspects at the Olympic Games. In the main, government policies for the tourism sector and the management of tourism-based businesses have accepted ecological durability as a strategic objective.

However, the authorities responsible for tourism and sporting affairs cannot, on their own, find solutions for environmental problems created by civilization as a whole, in particular the underlying problem of hypermobility, to which tourism and sport contribute. The community of nations is dealing with problems of this scope in the framework of the Climate Convention, whose goal is to lower CO₂ emissions back to their 1990 levels. To attain that goal, countries need to take measures aimed at reducing the consumption of fossil fuels, but consumers should also do their part. Tourism and sports authorities should support such

measures, particularly as they intersect with the interests of their sectors. By way of an example, a broad-based reduction in airplane fuel consumption, which may be achieved by greater ecological efficiency by aircraft and perhaps also by incentive programmes or taxes.

Field of application in the tourism and sport sectors

Nonetheless, the tourism and sport sectors have an ecological responsibility as well. There are any number of ethical codes, one of which is the WTO's Global Code of Ethics (WTO, 1999) which lays down standards of behaviour to safeguard the environment in the fields of tourism and sport. Such codes are often idealistic or moralizing in nature. However, in actual fact it is a matter of implementing accepted, underlying ecological rules when carrying out projects in the fields of tourism and sport.

From the point of view of national governments, it is first and foremost a question of applying the precautionary principle. The potential costs and benefits of a project need to be established using a holistic approach. In that way the optimum conditions for territorial development for areas for habitation, transport, and scenery are set beforehand, thereby lowering follow-up costs. Territorial management tools that do not lock economic structures in place and do not preclude economic development entirely should be used. If they conform to the desired environmental standards of their own accord, economic circles will be able to fulfil the ecological objectives voluntarily within a framework of cooperation, making it unnecessary for the government to enforce coercive measures. In short, visitors, sportsmen, and service providers in the fields of tourism and sport should themselves bear the costs of the environmental burdens for which they are responsible, in line with the polluter-pays principle.

Strategic ecological management of sport and tourism projects

There have been many exemplary projects in tourism and sport that have taken these fundamental ecological principles into account as much as possible. For instance, the organizers of the 2000 Olympic Games in Sydney took a number of voluntary measures intended to address ecological difficulties, in keeping with the guidelines of the IOC and other non-governmental organizations (Preuss, 2000). Accordingly, sports facilities were to a large extent supplied by renewable power sources and were largely built on reclaimed, decontaminated land. Spectator flows were handled by public transport. In Greenpeace's assessment, the green games in Sydney can, on the whole, be considered a positive example (Greenpeace, 2000). This shows that macro-events do not only impact adversely on the environment but can also be beneficial to the environment.

The Swiss "Human Powered Mobility" project, which involves both tourism and sport, is another example that deserves to be mentioned. It comprises a nationwide network of sport tourism products linked to the public transport system with an emphasis on muscle power, e.g., cycling, hiking, canoeing and kayaking, as well as mime skating. This initiative has met with great commercial success.

CONCLUSIONS

It is not possible to run the Earth, called “the blue planet” by astronauts, like a business. Ecological problems are much too complex. There is unlikely to be time to fully understand and evaluate a phenomenon like the greenhouse effect and the regional consequences of that effect in depth and to take the necessary countermeasures in time without falling into the trap of conflicts of interest.

According to the second law of thermodynamics, our planet will not be able to survive forever because of increasing entropy (Keller, 2000). Nevertheless, despite this serious hurdle, it is at least worthwhile to fight for environmental protection in the realms of tourism and sport. Visitors and sport practitioners want clean air in which to live and train. They want fresh air and clean water. People living in tourist areas should be protected against the natural threat of marked changes to their environment.

PETER KELLER is in charge of Tourism Affairs at Switzerland's Federal Administration. In this capacity, he serves as President of the Regional Commission for Europe of the World Tourism Organisation (WTO) and of the Tourism Committee of the OECD. He also holds the chair and leads the Institute for Economics and Industrial Organisation in the field of tourism at the Ecole des HEC of the University of Lausanne. He is President of the International Association of Scientific Experts in Tourism (AIEST).

Tourism, Sport and the Environment

Lisa Delpy Neirotti

DIRECTOR OF THE SPORTS
MANAGEMENT PROGRAMME,
GEORGE WASHINGTON
UNIVERSITY

PREPARING FOR THE RISE IN SPORTS TOURISM



PRESENTED BY: LISA DELPY NEIROTTI, Ph.D.
THE GEORGE WASHINGTON UNIV

Understanding Human Resources & Sports Tourism

- ◆ Definition & Scope of Sport Tourism
- ◆ Employment Opportunities within Sports Tourism
- ◆ Job Requirements
- ◆ Job Qualifications
- ◆ Academic Programs
- ◆ Trends to Consider

WHAT IS SPORT TOURISM?

- ◆ A 3-DIMENSIONAL CONCEPT INVOLVING SPORT + TOURISM



- ◆ TRAVEL TO PLAY SPORT
- ◆ TRAVEL TO WATCH SPORT
- ◆ TRAVEL TO SPORT ATTRACTIONS

SPORT TOURISM INCLUDES TRAVEL FOR:

- ◆ RECREATION
- ◆ COMPETITION
- ◆ ADVENTURE
- ◆ HEALTH/NATURE
- ◆ BUSINESS
- ◆ EDUCATION
- ◆ SOCIALIZATION/ENTERTAINMENT



THE SCOPE OF SPORT TOURISM IN THE U.S.

- ◆ Team & Participant Travel = \$6.1 billion*
- ◆ Corporate Incentive Travel = \$2.1 billion*
- ◆ Family & Spectator Travel = \$47.3 billion
- ◆ Adventure & Fantasy Travel = \$62.8 billion
- ◆ Total: \$118.3 billion
- ◆ Recreational Expenditures exceed \$350 bil/yr
- ◆ Annual Growth Rate 8-10%

*Markets reached by SportsTravel Magazine

Employment Opportunities in Sports Tourism

- ◆ Hotels
- ◆ Airlines
- ◆ Mountain, Water or Ski Resorts
- ◆ Cruises
- ◆ Convention & Visitor Bureaus
- ◆ Sports Commissions
- ◆ Sports Teams (travel managers)
- ◆ Sports Organizations (event managers)

Employment Opportunities in Sports Tourism

- ◆ Sports Venues
- ◆ Parks & Recreation Departments
- ◆ Travel Agencies
- ◆ Tour Operators
- ◆ Outfitters
- ◆ Sports marketing agencies (SFX, Octagon)
- ◆ Market research companies

Job Responsibilities within Sports Tourism

- ◆ Accommodation and transportation bookings
- ◆ Meal and entertainment logistics including ticketing
- ◆ Event management implementation
- ◆ Sponsorship solicitation
- ◆ Media & Public relations
- ◆ Financial accounting
- ◆ Risk Management

Job Responsibilities (cont)

- ◆ Develop and disseminate marketing collateral
- ◆ Identify suitable events & prepare bids
- ◆ Attend trade shows and build relationships
- ◆ Write grant proposals
- ◆ Plan and implement fund raising activities
- ◆ Recruit and coordinate volunteers
- ◆ Conduct economic impact or market studies
- ◆ Lead activities
- ◆ Bring sport-related business to company or city

Employment Qualifications

Education and/or experience in:

- ◆ tourism
- ◆ sports marketing
- ◆ hospitality sales
- ◆ marketing
- ◆ public relations

Employment Qualifications

Understand the Business of Travel

- ◆ Terminology
- ◆ Pricing structures
- ◆ Air safety regulations

Understand the Sport Industry

- ◆ Needs of the athletes, VIPs, media, spectators
- ◆ Sponsorship
- ◆ Safety and security

Detailed Qualifications

- ◆ Communication skills to build consensus and cooperation among area attractions, hotels and other tourism industry representatives
- ◆ Marketing skills to open destination to new markets specifically in the sports area
- ◆ Sales ability to secure funding through sponsorship and to attract events and people to destination
- ◆ Organization skills to develop plans and coordinate staff and volunteers

Academic Programs in Sports Tourism

- ◆ Modules, courses, certificates, and degrees offered in USA, Belgium, Canada, United Kingdom, Australia, and South Korea (28 total responses)
- ◆ Programs offered in various academic departments including physical education, recreation, sports management, tourism, hospitality, and leisure.

(Source: Sweet, K. An Assessment of Sport Tourism Curricula at Academic Institutions, *Journal of Sport Tourism*, Vol. 6 #1, 2006.)

Specific Academic Courses

Course titles include:

- ◆ General Recreation, Management, & Tourism courses
- ◆ Sports Tourism Foundation courses
- ◆ Sports Tourism Management courses
- ◆ Sports Tourism Law courses
- ◆ Sports Tourism Finance courses
- ◆ Sports Tourism specialization courses
- ◆ Sports Tourism projects and dissertation courses

A total of 84 sport tourism courses were being offered.

(Source: Sweet, K. An Assessment of Sport Tourism Curricula at Academic Institutions, *Journal of Sport Tourism*, Vol. 6 #1, 2006.)

A Missing Element

Tourism Information Systems or a similar course that covers:

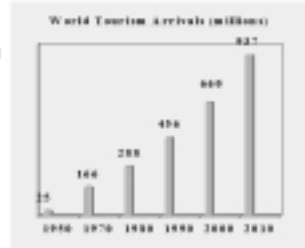
- ◆ Web site Development & maintenance
- ◆ Data base management
- ◆ Viral Marketing

Trends to Consider When Preparing Sport Tourism Professionals

- ◆ Tourism continues to grow
- ◆ Aging population
- ◆ Popularity of Activities
- ◆ Reasons for Travel
- ◆ Technology & travel
- ◆ The importance of selling dreams

World Tourism Growth Forecasts

- ◆ World Arrivals: 937 million worldwide; (2010) and 1.6 billion world (2020)
- ◆ Arrivals will grow annually 4.3% worldwide
- ◆ Tourists will spend US\$2 trillion (2020).
- ◆ Spending will grow 6.7% per year

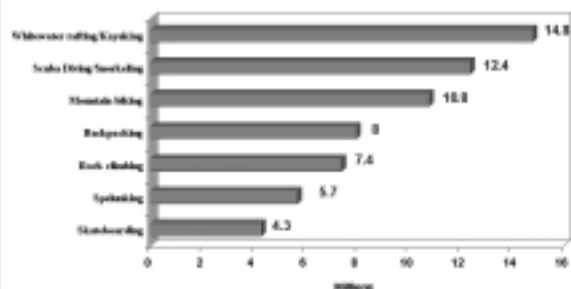


Source: WTTC/WTTC

“Floridization” of the developed world



HARD ADVENTURE ACTIVITIES (On Trips in Last 5 Years)



Source: Travel Industry Association of America, Inc.

Overall Trends: Travel & Internet

- ◆ 3% of all travel currently booked online, 8% by 2001
- ◆ 11 million people currently book travel online
- ◆ Online travel market \$7 billion in 1999 and hit \$20.2 billion in 2001.
- ◆ Merger Travelocity.com & Preview Travel 1999 bookings US\$1 billion+

Source: ThePricelineGroup Travel 1999 Analysis, Assumptions and Forecasts For The Online Travel Marketplace

IMPORTANT REASONS FOR U.S. FAMILY VACATIONS

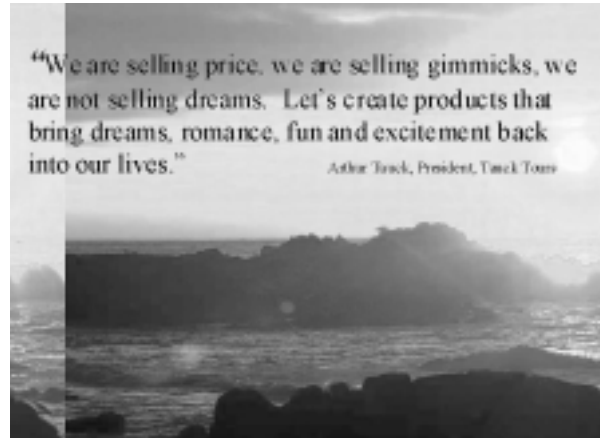
(% of 1998 Family Vacationers)

Family Togetherness	86%
Get Away from Stress	69
Rest and Relaxation	68
Visit Friends/Relatives	48
Excitement/New Experiences	41
Physical Activity	32
New Places/People	30
For Luxury/Feel Pampered	17

Source: Travel Industry Association of America, Inc.

"We are selling price, we are selling gimmicks, we are not selling dreams. Let's create products that bring dreams, romance, fun and excitement back into our lives."

Arthur Track, President, Track Tours



LISA DELPY is director of the Sport Management programme and the MBA programme in Tourism and Hospitality Management at the George Washington University School of Business and Public Management in Washington DC. She is the founder and organizer of the annual TEAMS conference on Travel, Events, and Management in Sports, which aims to define and develop the growing field of Sports Tourism. She is co-author of the book *The Ultimate Guide to Sport Event Management and Marketing* and serves on the editorial board of *Sport Marketing Quarterly* and *Sport Travel* magazines.

Impact of Sport Events on Tourism Image

Jean Penot

INSPECTOR GENERAL OF YOUTH
AND SPORTS, FRENCH
SECRETARIAT OF TOURISM

Firstly, I would like to specify what my job in the French Ministry of Tourism involves. In 1999, this ministry and the Ministry of Youth and Sport decided to reinforce their collaboration by setting up an interministerial mission that would reflect on and make propositions referring to all questions that arose regarding three important subjects: sport, tourism and youth. This mission was put into practice at the beginning of last year and the works were primarily oriented towards four areas: tourism for youths, tourist development through sport, mountain sports and finally the statistical and economic analysis of the different areas.

Before going any further, I would like to clarify what sport means for me. I consider it to be a series of physical or sporting activities carried out for a recreational, social and well-being purpose or during a competition. Thus, the activities encompass a large range of participants from family members to high-level participants, the elite. Therefore, I obviously praised the initiative taken by the IOC and the OMT which also linked France's will to reflect and act on an aspect of tourism that has a strong potential for growth.

Why do both countries that are very interested in international tourism and countries that wish to improve their tourist offer find this conference so interesting? For a country like France, which is one of the first tourist destinations in the world, the partnership "sport and tourism" has become a real issue. Thanks to the natural heritage, which is both diverse and easily accessible, the French territory is currently one of the last "play spaces" European tourists can encounter. The natural sports the "Anglo-Saxons" globally call "the outdoors" have experienced a large boost and the space in which they are carried out has been developed during the last few years. Let me give a few examples: the number of climbing areas has doubled over the last ten years, the amount of canyons has multiplied by 50 and hang-gliding areas by four.

Currently, France offers extensive mileage dedicated to tourism and sport. For example, there are currently 180,000 km of marked paths for rambling, 33,000 km of tracks for cycling and mountain-biking, 18,000 km of marked paths for pony trekking, and 30,000 km of routes along 750 rivers or parts of rivers that are used for nautical sports (canoeing, kayaking, etc). Thus, there is a vast heritage where the tourism image is excellent in terms of beauty, authenticity of natural spaces and also acceptable in terms of "convenience" from a sporting point of view. I would like to say that changing the image of Camembert and Bordeaux, from being the country of gastronomy and living well, to a more sporting image or making the country look like a place to come to practice a sport is all but easy. Thankfully the French football team won the World Cup and the European Cup. Thus, things are starting to change a little.

The partnership made up of “sport and tourism” is also an opportunity for those countries who wish to develop or diversify their tourist offer. I will offer three examples, the first two are in Africa and the third in Europe. Example number one: Egypt, which, as we all know, is an important tourist destination. Thanks to the development of scuba diving in the Red Sea it is also now a large sporting destination. The islands in the Cape Verde have become a new tourist destination, and although it is still quite modest it will undoubtedly develop thanks to windsurfing. Example number three: Aragon, a province near the Pyrenees in Spain, which has found a new life through “canyoning”.

Apart from these examples, how does one measure the impact of a sporting event on a country's, province's or city's tourism? Should one consider that strong investments are the only witnesses of the impression a large sporting event has left on said country, province, city? Should one consider that the increase of the attendance to hotels and tourist equipments in general is the only consequence the event brings? I do not think so. Given that alongside these tangible and immediate elements there are all the consequences that one calls image: an image that is now vitalised, transformed, renovated and enlarged. A brief, new perception of a tourist destination or of a destination that will start to attract tourists.

Nonetheless, which sporting events are we referring to? I think it is necessary to move on to a typology I will humbly try to explain to you.

I think there are four types of events that have quite different tourist impact.

*First type: **world events***, for example, the Olympic Games, therefore events that have a worldwide media coverage. The implications on the organising country's tourist image concerns their savoir-faire, the quality of their welcome and their tourist infrastructures. From this point of view, Sydney was a magnificent example. However, after hosting the Football World Cup in 1998, the press and the visitors all considered France to present an image of a serious and welcoming country.

*Second type: **national events with an international relevance***, for example the Tour de France, Wimbledon, The Race, etc. If the event is international, generally it will be covered by the countries that have athletes taking part in the competitions or by those who have a traditional interest in the sport in question. The image of high level sport is mainly aimed at a public composed of fans, although it can attract the general public.

*Third type: **local sporting competitions that have a strong symbolic value*** for those who practice the sport but also for certain sectors of the public. For example, this is the case of the New York marathon or the bull-running in San Sebastian, etc. The technicality of the sites and areas where the competitions are carried out reflects either a natural, authentic, wild or extreme image if it takes place in natural areas or an image of humanized city if it takes place in the centre of a city.

*Fourth type: **the gathering of people who practice sport for a non-competitive purpose*** just because they enjoy being together in a pleasant natural area. This is the case of Ardèche, in France, that gathers 12,00 participants each year in one of the largest cycling races in Europe. The image these sporting events, or more specifically these non-sporting events, transmit is that of a relaxed, recreational, convivial practice that is shared in a pleasant, natural environment that can be accessed easily.

Those are the four types of sporting events that I consider to have a tourist impact. However, I also believe it is necessary to differentiate their effects depending on the natural, urban or cultural environment where they take place. I will briefly set out three types of events depending on their environment:

Firstly, events that take place in artificial and standardised contexts, for example football, athletics, swimming, etc. A football stadium, be it in Buenos Aires or Barcelona, is always the same, it has the same measurements.

Secondly, sporting events that take place in natural or urban areas which are used as sporting areas. For example, the Tour de France and the New York marathon.

The third type of events, are those that **take place in natural un-known areas** such as sporting areas and informal gatherings.

I think it is also necessary to establish the effects on the tourism image, as there are positive effects and effects that are less positive, or the collateral damages that sport has on tourism. I have divided them into three categories which I think should be considered very seriously.

The first is the **saturation of certain tourist sites when sporting events take place and the cohabitation between many different persons**. For example the cohabitation between tourists and supporters.

The second problem is the **conflicts between the different users of the same natural spaces**, for example beaches. In the past, they were only used by swimmers, but now there are swimmers, windsurfers, kites, water-skiers, etc. On rivers and lakes there are people canoeing, rowing and fishing, and all users do not necessarily have the same goals.

The third danger is **the risk of burning out the image of the tourist site for non-sporting tourists**. I will give you an example about Nordic skiing. About fifteen years ago, French winter resorts embarked on the promotion of Nordic skiing hoping to attract the older clients, or people who were less sport-minded than those who enjoyed descents. Therefore, they developed a Nordic skiing area but used a very sporty image using cross-country skiing on the leaflets. They did not display families or "senior citizens" on the ski runs but instead featured high-level skiers or professional skaters. Thus, they created the exact opposite effect that they had hoped for. Market studies showed that the sporty image had pushed a lot of the clients towards more gentle mountain sports such as snow-shoe treks. This trend was also noticeable through sales figures provided by sport industries that observed that the sales for cross-country skiing were plummeting whilst snow-shoe sales were increasing. Thus the interest in making the professionals dedicated to tourism, the authorities and also industrial professionals collaborate.

Ladies and gentlemen, these are a few reflections and questions regarding the impact sport has on tourism. Summarising, one could say that indicators chosen by both the tourism sector and the sport sector could be put into practice to understand their impact more clearly. In my opinion, the indicators would be tools that help the authorities, commercial operators, professionals dedicated to tourism, professional sportsmen and companies with no lucrative purpose such as sport clubs and federations to make their decision.

I think that there are four types of effects that sport has on the tourism image that should be analysed closer:

- The enlargement of the tourism image by means of sporting events,
- The vitalization of the tourism image,
- The transformation of the tourism image and
- The creation of a new image through sport.

Thank you for your attention.

***JEAN PENOT** formerly worked as Director of Communication for the Ministry of Youth and Sport of France and later was Director for Employment and Training in that same ministry. He is currently in charge of an interministerial project on Sport Tourism under the auspices of the Secretariat of State for Tourism.*

Joint Marketing of Tourism and Annual Sport Events

Dario dell'Antonia

GENERAL DELEGATE FOR
TOURISM, MONACO

For a long time, and especially since the establishment of Monte Carlo in 1866, the Princes of Monaco have placed great importance on cultural and sporting events. This has been a political commitment in combination with private-sector leaders and decision makers, as evidenced by this photograph of Prince Albert I with the President of the Société des Bains de Mer, Monsieur Camille Blanc.

The Prince de Monaco Cup for the best entrants in the annual regattas and the first tennis tournaments and golf championships has existed since 1865.

The pioneers of motorboating were also given a warm welcome, in particular the speedboat drivers whose events were extremely popular with tourists. Nothing was left to chance, by way of example the test flight of Santos-Dumont's dirigible, which ended with a grand plunge into the sea.

Here are some pictures of the crazy young men in their flying machines. A grand prix was organized from Monaco to Tunisia with a stop at Corsica.

All sports were considered deserving, and organization of a world boxing championship was certainly not to be overlooked. All these events clearly had enormous media appeal and have made extremely large contributions to the creation of the legend of Monte Carlo.

Even events that were largely unattended were organized, for instance the first women's games were held on the clay shooting range, a site also used for high-level shooting matches at a time when tourist attendance was very high.

This political commitment continued throughout the past century, and the infrastructure and human resources were adapted to technical advances and changing times.

It would take too long to list all the events which can be used to create tourism products held over the course of the year, so I will only mention by way of examples some of the events that receive the most media coverage and are most highly attended, such as the international tennis tournaments, show jumping, and the Herculis athletic meet, which today has attained the same stature as the Zurich meet.

Despite an extremely small surface area of less than 2 km², such extreme sporting activities as rock climbing, marathons, and triathlons are also held.

Another event with considerable media impact is the annual awards ceremony organized by

FIA, IAAF and GAISF along with private enterprises such as Richemont, which last year launched the Laureus Sports Awards.

To top off the list, I would like to mention the "Pro-Celebrity" events in such sports as tennis, golf, and sailing, in which professionals play with show business stars, socialites or business personalities in order to raise money for charity.

The success of the events based on vintage vehicles, such as historical sailing ships, during Classic Week is yet another pleasure to see, not to mention the classic automobile rallies and the splendid Historical Automobile Grand Prix.

DARIO DELL'ANTONIA is the General Manager for Tourism of Monaco. With an education in hotel management from the Hotel School of Lausanne and Cornell University, Mr. dell'Antonia began his career in Paris, where he managed the Grand Hôtel and the Café de la Paix. After moving to Monaco, he was appointed General Director of Hotels, Restaurants and Spas for the Société des Bains de Mer. He worked on the Tourism Board of Cannes, France and in 1996 was appointed General Manager for Tourism of Monaco.

Joint Marketing of Tourism and Annual Sport Events

René Clerissi

PRESIDENT OF THE PROTOCOL
COMMISSION, MONACO

Referring to “The joint commercialisation of tourism and large sporting events” through the example set by the Monaco Grand Prix comes close to being impossible. There is, in fact, no need, from a practical point of view to commercialise this competition, given that, on one hand, all of the seats in the stands have already been sold, even though the Grand Prix takes place on May the 27th, and on the other hand, all the hotels in the Principality hang up the “no vacancies” plaque at least one year before the race takes place.

Thus, my intention will simply be to demonstrate the importance that the two main competitions the « L'Automobile Club de Monaco » (“Monaco Automobile Club”) organizes evidently have, and have always had, regarding tourist life in the Principality. I will begin with the Automobile Rally.

When, in 1911, the members of the Association known as “Sport Automobile and Velocipede of Monaco” – which then became the A.C.M. – decided to organise an “International Automobile Rally” all they wanted was to attract a new clientele to Monaco in the middle of January – which was then the peak tourist season. This clientele consisted of particularly wealthy sportsmen, who – during the last century – were owners of automobiles.

That was why the organisers of this 1st Rally had expected contestants to depart from 11 European capitals – although in the end there were really only six – and to reach the finishing line in the Principality after a period of time that would last eight days.

This first rally – in which 23 teams took part– would be most importantly, as specified in the original regulations, a “tourist competition”, given that the only rule contestants had to abide by was that they had to travel a distance of 240km every day, which made them stick to an average 10km an hour. Most of the participants exceeded this average, given that the fastest driver achieved a average of 22.655km an hour, which all the specialists in automobile sports found astounding.

The organizers of the Rally, which over the years has become the “Automobile Rally of Monte Carlo”, have conserved the same formula for their competition up until recent years, and over time have simply given their event a more sport-oriented nature and have also increased, in a very significant way, the number of departure cities, of which there were 28 in 1930.

Indeed, other cities joined the original departure cities, some of which were at quite a long distance from Monaco, such as John O’Groats – the northernmost city in the United Kingdom – Riga, Tallinn and even Tunisia, Constantinople and Salonika.

The increase in the number of departure cities resulted in the increase of the number of participants – in 1952 there were 369 cars at the starting line, the equivalent of thousand people. Thus, this soon made the Rally one of Monaco's major tourism events.

Indeed, this event did not simply attract a large number of visitors to the Principality in January of each year – given that as well as the actual participants, there were accompanying personnel, persons in charge of the maintenance of the vehicles and even in charge of contributing to make Monaco renowned all along the concentration areas that led participants from the different starting cities to Monte Carlo.

The professionalism that currently characterises motorist sports, plus the creation of new regulations drawn up by the F.I.A., which limits the maximum duration of rallies to three days made organisers arrange the whole of the competitions in a certain radius around a single city as well as stipulating that contestants must gather every evening. This inevitably diminished the importance and the role that the Rally of Monte Carlo had enjoyed for over 50 years in the Principality's economic life.

That was the main reason that led to the creation, in 1997, of a new competition that was christened the "Historical Rally", which was organised in line with the Monte Carlo Rally. This competition took up the eminently tourist-oriented vocation the Rally originally had. The new competition has already fulfilled the task perfectly as the 5th edition of the Historical Rally, celebrated last January, gathered over 220 cars, all built during the 1960s and 70s, and started out from five large European cities, one of which was Barcelona.

It is now time to mention the Automobile Grand Prix, which is currently the main competition organised by the A.C.M.

In fact, it was the same ambition that had led their predecessors to create the Rally that in 1929 led the members of the A.C.M. to create a motor race that would be exclusively be carried out along the streets of the Principality.

They hoped that this new competition – which they set intentionally in the month of April, i.e. a transitory period between the winter tourist season (that still had its loyal clients) and the summer season, which was just starting– would attract a new and important clientele to Monaco, during a period when tourism demand was relatively low.

The results soon showed that their predecessors were right, given that the fifth edition of the Grand Prix, which was held on 23rd April 1933 – which was, it is important to state, the first motor race to be transmitted by a radio station – attracted almost 100,000 people to the Principality for one week. They consisted of a large number of celebrities, plus a few crowned heads such as the King of Spain and the King of Sweden, whose grandson is still a loyal spectator of this competition, and attends every year.

The popular success that the Monaco Grand Prix found, has simply grown since then.

Although the number of spectators who pay to watch the actual race is relatively low, under 35,000 people, one must add various dozens of spectators, who year after year watch the Grand Prix from the terraces and balconies of the buildings that surround the circuit or from the decks of hundreds of yachts that are moored for the day in Monaco's harbour. The number of actual spectators is so low given that it is impossible to construct large stands around the circuit, which is surrounded by buildings or cut off by the sea.

Given the extent to which this proves the importance of the Grand Prix regarding the Principality's tourist life, I find it tremendously significant to mention that during the race thousands of people stroll around the streets located round the circuit, just to enjoy the experience at a distance and to find themselves immersed in the atmosphere of the event, although they know they will see nothing of it.

In this respect, a recent study, carried out at the request of the F.I.A., has allowed us to establish that during the week the Grand Prix is carried out, the Principality – which, let us not forget, has only 35,000 inhabitants – accommodates exactly 222,432 visitors, which is, of course, extremely beneficial for the tourist industry.

The same statistic study revealed that these visitors spent a sum during the whole of the week, that amounted to 71,493,200 U.S. dollars – approximately £49,136,219– which benefits hotels, restaurants, bars, and the local trade, plus a number of service-oriented companies that carry out activities particularly associated with tourism.

In this respect it is important to underline that the effects of the Grand Prix do not simply affect the area of the Principality – because as you know it is one of the smallest states in the world. They also largely benefit the tourist activities that are carried out on a 170 km long area, between Saint-Tropez and Savone in Italy.

To conclude, I would like to briefly mention the particularly beneficial consequences the Grand Prix indirectly produces for Monaco in the field of tourism.

I would like to point out in the first place that this is taken advantage of by large international companies, which carry out their activities in the most diverse fields, as they invite their most important clients to attend the motor race.

The short time these persons spend in the Principality in the particular atmosphere of the Grand Prix often incites this particularly interesting clientele to come back and spend their holidays, or even to organise a seminar or conference here.

However, most importantly, the Automobile Grand Prix allows millions of people from all over the planet to discover Monaco or get to know it better by means of the publicity the media gives this event, and specially through the images broadcast by television to all parts of the world.

Allow me to illustrate this point with some figures, as they are often more eloquent than long speeches.

In fact, it is important to know that last year, the Monaco Grand Prix – which was covered by thousands of journalists and photographers – was broadcast to 144 countries located in five continents by 481 television channels that devoted 975 hours to broadcasting images of the race, which 334,409,935 spectators watched.

Thus, through these images of the race, they also discovered – they being the dozens of thousand of spectators in Europe, both Americas, Africa, Asia and Oceania – the Principality and its main tourist centres such as the Casino, the great hotels or even the old harbour, given that – contrary to the permanent motor-racing circuits that are located far from cities – the circuit in Monaco's Grand Prix is "recreated" each year in its entirety in the very centre of the City.

We all known how important television is now in everyday life, thus it has become evident that the broadcasting of the Monaco Grand Prix in 144 countries is a key element in the promotion of tourism in the Principality.

To conclude, I would like to share with you an experience that I had a few years ago to demonstrate the essential role the Grand Prix has when it comes to reflecting the image of Monaco as a brand in the world and also in order to illustrate the humanitarian role which sport should have, as the great humanist President Samaranch reminded us yesterday morning.

I had been taken to visit a Palestinian refugee camp on a humanitarian mission, and I found myself face-to-face with a group of children who were about twelve years old. All they had learnt in their lives was about misery and war, and their knowledge of the outer world was cut off at the barbed-wire fences that enclosed the camp, which made up their whole universe.

One of those children asked the interpreter who accompanied me where I was from, and he answered "Monaco". I suddenly saw his face, which until then had been veiled by fear and sadness, light up with a big smile and become a child's face once again.

Then he said, with a cry that came from the bottom of his soul "Monaco, Formula 1, Schumacher" and added "one day I will also come and race in your state."

Through that cry, and through that smile, brought back by the magic of sport, hope entered the life of those lost children once again, in the shape of a dream.

RENÉ CLERISSI is an attorney and Honorary President of the Economic and Social Council of the principality of Monaco. As President of the Protocol Commission of the Monaco Automobile Club, he is in charge of foreign relations during the annual Monaco Grand Prix auto races. He is also Vice President of the Monaco Athletics Federation and competed in the Olympic Games as a member of the Monaco sailing team.

The Olympic Games and Australian Tourism

John Morse

MANAGING DIRECTOR

AUSTRALIAN TOURIST COMMISSION

INTRODUCTION

I believe in making bold statements at the opening of a speech. Today is no exception. The Olympic Games are the best thing that ever happened to Australia's tourism industry.

Over the next thirty minutes, I am going to explain and show you why the "best Olympic Games ever", to quote President Samaranch, were the "best thing ever", to quote John Morse, for Australian tourism.

But in just fifteen seconds I can demonstrate why the Games were so good. How many of you here in Barcelona today have been to Australia? How many of you would like to go to Australia? How many of you will go to Australia?

I guarantee that the number of people wanting and willing to go is double or twice that of what it would have been had I asked the same question this time last year. That's the power of sport and tourism.

Another question? When has your destination received 36 billion – 36 thousand million - viewing hours on television? That's the power of the Olympic Games.

For the Australian Tourist Commission, the ATC, Australian tourism and Australia in general, the Games have had a profound impact.

In short, they allowed us to do things we've never done before:

- Australia's international tourism brand has been advanced by ten years
- we have had, are having and will continue to have increased international visitation and export earnings;
- the Games have increased the likelihood of visitation to Australia;
- new standards have been set for Australian tourism – service quality, infrastructure, organisational ability and more;
- the Games have dramatically increased the profile and awareness of Australia as a holiday or vacation destination;

- the industry in Australia works more closely together;
- tourism now has a much higher profile in Australia thanks to the Games;
- Australia now has a permanent seat on the world stage; and
- the Games have opened many doors for the ATC, which we are going to keep open in the years ahead.

One of those doors is at are Château de Vidy – the IOC headquarters in Lausanne. Next week, the ATC will be presenting in more detail to the IOC's marketing team and future host cities.

The IOC has already declared that what the ATC and Australia did for the Games in tourism is a role model for future host cities and countries. We want, indeed we feel we have an obligation, to share our experience so that other places may benefit, just as Australia has.

We also feel that Australia has made tourism another dimension of the Olympic Games – joining sport, culture and the environment. We believe, indeed we know, that tourism is another major benefit of hosting the Olympic Games and other major events and this should encourage more cities to bid in the future.

At no time in Australia did we ever question the day we won the right to host the Olympic Games. We saw the picture – we saw the big benefits – we knew the Games would be the best thing that ever happened to Australian tourism.

Video – Olympics retrospective

Today, I want to talk about what we set out to do, what we did, what we achieved and the lessons we learned.

HISTORY

On 23 September 1993, Sydney was awarded the right to host the Summer Games of the XXVII Olympiad in the year 2000. The announcement was a momentous occasion for Australia. It was equally significant for Australia's inbound tourism industry.

Olympic host cities and countries over the years have run some form of tourism promotion in association with the Games. However, back in the early 1990's, Australia was rarely seen or heard on the world stage. It was a place mentioned from time to time. From the moment Sydney won the right to host the Games, it was going to be different for Australian tourism. The Games would give Australia the chance to compete in the interest and awareness stakes on an equal footing with the Americas, Europe, Africa and Asia. It would take Australian tourism places it could never afford to go. However, it wouldn't happen automatically. Just as athletes have to prepare and train for the Games, so too did Australia's inbound tourism industry.

With this in mind, the inbound tourism industry in Australia, led by the Australian Tourist Commission (ATC), set out to ensure that Australia made the most of this once in a lifetime opportunity. To the ATC, the Games weren't just a 17 day event – they were a decade of opportunity.

Since Sydney won the right to host the Games, the ATC worked tirelessly to ensure that every

possible benefit be obtained from hosting the Games.

The ATC obtained US\$6.7 million from the Australian Government over four years (1997 – 2000) to maximise the tourism opportunities presented by the Games. The strategy was fully implemented in the year 2000 under the slogan *Australia 2000 – fun and games*.

The ATC's Olympics Tourism Strategy was aimed at adding depth and dimension to Australia's international image and increase long-term economic and social benefits for Australia through increased export earnings, employment, visitor arrivals and visitor dispersal.

The objectives of the strategy were:

- maximising promotion for Australia through a media relations program incorporating media visits, new technology, information distribution and issues management;
- promoting Australia's image through alliances with Olympic organisations and partners;
- increasing high yield markets such as meetings, incentives and conventions; and
- creating trade-marketing programs for the tourism industry to capitalise on Olympic Games opportunities.

The ATC used this funding to work in partnership with Olympic sponsors, television broadcast rights holders, the media and the Olympic Movement to maximise the tourism opportunities presented by the Games.

Olympics related activities were overlayed across all of the ATC's advertising, publicity, visiting journalists, Internet, media relations and trade events programs. At the same time, the tourism aspect of the Games was used in Australia to promote the profile and importance of the ATC and inbound tourism and its potential to create jobs and foreign exchange earnings.

Central to the thinking of the ATC's Olympic Games Tourism Strategy was to use the Games to add depth and dimension to *Brand Australia* by promoting more than just the typical tourism images and themes. This was done by bringing together *Brand Australia*, the Olympics Brand (the most recognised brand in the world) and the brands of Olympics partners (sponsors, broadcasters and the Olympic Family). By working with the world's broadcasters, the ATC aimed to make the Olympic Games a two-week documentary on *all* of Australia for a global audience of 3.7 billion people over 36 billion viewer hours. With the media, the Games were used as the hook to get reporters and programs interested in all aspects of Australian life. Underlying the strategy was the need to continue the relationships well after the Games had concluded.

The Olympic Games remain the most significant beneficial event in the history of Australian inbound tourism. The results achieved by the implementation of the ATC's Olympic Games Tourism Strategy are equally significant. Over the course of four years, well over 1,000 individual projects were implemented of which the majority occurred in 2000.

ACTIVITIES

Australia's tourism authorities, led by the ATC, formed a powerful partnership to ensure the whole of Australia reaped the benefits of this Olympic decade of opportunity.

The ATC's ambitious, US\$6.7 million four year strategy is unique in modern Olympic Games history. No other host country has taken the opportunity to use the Games to promote the whole country's tourism image as well as the host city's. No other host country has worked so closely with the Olympic partners to develop mutual benefits from linking the tourism brand with their products and services. And no other host country has developed such an extensive media relations program to ensure that every possible publicity opportunity was maximised.

The strategy was implemented in several key steps:

1. The Olympic Games strategy and the establishment of a specialist unit occurred within two years of Sydney winning the right to host the Games. The formulation of the strategy examined the lessons learned by previous host cities of the Olympics and other major events. Central to this strategy was the need to look at more than just the 17 days of the Games. It was a decade of opportunity. At the same time, it was imperative to be realistic and not over-inflate expectations.
2. We educated the ATC internally on the strategy and gained support and ownership on a worldwide basis.
3. The ATC obtained the support of the local tourism industry for a coordinated approach.
4. The Sydney Organising Committee, SOCOG, then came into the picture
5. The ATC then obtained Australian Government policy support and funding to implement the program.
6. We then set about the huge task of establishing relationships with the Olympic Family – consisting of the IOC, worldwide and local sponsors, the media, broadcast rights holders, National Olympic Committees and their tour operators and the sporting federations.

The Olympic Games Liaison Business Unit was established in June 1995 with the appointment of Maggie White as Manager, Olympic Games Business. The principal function of the unit was to identify opportunities, co-ordinate activities and manage relationships. They were huge tasks and her team of three did a magnificent job.

The objectives and strategies, developed by the unit in conjunction with other ATC operations in Australia and overseas were designed to capitalise on the potential tourism opportunities. The unit, in conjunction with other stakeholders, worked toward identifying Olympic related tourism opportunities that were measurable, achievable and realistic.

It was reasoned that through identification of these opportunities the Olympic Games offered extraordinary leverage to the ATC's marketing efforts. The ATC recognised the importance in promoting strategic alliances with traditional and key non-traditional stakeholders both in Australia and overseas. The ATC's role was one of leadership in the tourism industry. It encouraged greater co-operation between all partners promoting

Australia internationally, ensuring consistency in marketing efforts and in what messages were promoted to the world.

As the Games drew closer, the ATC commenced the *Australia 2000 fun and games* campaign. In September 1999, the ATC announced that it would spend around US\$34 million over 12 months to ensure Australia achieved growth of around 10 per cent in visitor numbers in 2000. Given the experience of previous host cities and countries of major events, it was recognised that reaching targets in 2000 would be a challenge. At the end of 2000, Australia achieved 11 per cent growth.

At the same time, it became clear that the ATC was undertaking the biggest media relations program by any country for the Olympic Games or any other single event in the world to boost a nation's tourism profile. The program involved taking the interest generated in Australia by the Games and converting that into media coverage by providing whatever assistance possible to help the media do their job.

During the Games (15 September - 1 October 2000) the ATC's activities were primarily confined to hosting international tourism VIPs under the Business Development Program, assisting the media at the Main Press Centre and Sydney Media Centre and informing the Australian public via the media on the tourism benefits of the Games and how Australia was being reported internationally.

Toward the end of the Games, the ATC launched its post-Games strategy at a time when it became clear that the Olympic Games had been a huge success and that they had far exceeded the industry's expectations.

The endless stunning images of Sydney and Australia combined with numerous accolades in the media worldwide, placed Australia in a very powerful position in the competitive international tourism marketplace.

The post-Games strategy involved four key elements which are specifically aimed at capitalising on Australia's post Games popularity. The four key elements are:

- over 90 joint tactical advertising campaigns promoting holiday deals launched immediately following the Games. The joint campaigns involved more than 200 industry partners and were worth more than US\$25 million;
- an aggressive US\$3 million direct marketing campaign was undertaken including the redevelopment of the ATC's Internet site, *australia.com*;
- research was and continues to be undertaken on how the Olympic exposure had shifted Australia's image internationally; and
- the building of the lucrative Meetings, Incentive, Convention and Exhibition (MICE) sector led by the ATC.

That is a snapshot of the work undertaken by the ATC over a five year period. I will now run through some of the more specific activities taken within the Olympic Games strategy.

SPECIFIC ACTIVITIES

As I mentioned, the ATC's Games related activities were overlaid across all of the ATC's normal operations. We kept one eye on the main game and the other eye of the Olympic game. You have one or the other at your peril.

The ATC's Olympics Tourism Strategy had five key operating areas covering the Olympic Movement (the organisers, the ticket sellers, the IOC and the NOCs); the sponsors (both TOP sponsors and NOC sponsors), broadcast rights holders, the media and domestic corporate marketing.

Early on, I said to the ATC team, I don't want to wake up on 2 October 2000, the day after the Closing Ceremony, and think "Gee, I wish we did that". As it happens, I didn't wake up thinking that. I believe we did all we could have possibly done and then some.

I would now like to cover some examples of the work we undertook over the past five years.

Olympic Movement

In Australia, we became a close working partner of the organisers, the New South Wales Government through the Olympic Coordination Authority and SOCOG, the Sydney Organising Committee for the Olympic Games. They referred many people to us – sponsors, broadcast rights holders, NOCs and the media; they had us presenting at their media, sponsor and staff workshops and they actively sought our advice on many issues ranging from marketing, branding and imagery to ticket sales, media management, displays and community support for the Games. Importantly, we obtained the ability to use the Sydney 2000 "Millennium Athlete" logo and the Olympic rings. This is no small achievement when you become a player in "Olympic Inc."

Further a field, we were working with the ticket selling agencies of the National Olympic Committees. It is important to realise that 20 per cent of tickets to any Olympic Games, under the Host City Contract, must be sold overseas. This involves something like 199 countries (the number of countries that competed at the Sydney Games). It also involves hundreds of millions of dollars in critical revenue for the Organising Committee. We worked with the major ticket sellers on their marketing and to build pre and post tour packages. Interestingly, the first package that sold in the United States was for a family of four, first class travel and three weeks in Australia at a total cost of \$100,000. It is big money for the Organising Committee, the ticket sellers and for the tourism industry.

At this point I would also like to acknowledge the support of the IOC, in particular their Director of Marketing, Mr Michael Payne. He was a strong advocate of the link between tourism and the Olympic Games and introduced the ATC to many, many people. At times, when we found the going tough, and we from time to time as some didn't understand the link between their brand, the Olympic brand and Brand Australia, Michael Payne encouraged people to work with the ATC and this certainly paid dividends for Australia. Michael has gone a step further in declaring what the ATC and Australian tourism did for the Games to be a role model for future host cities and countries.

Now I would like to show one advertisement that was a joint venture between the ATC, the New Zealand Olympic Committee and Air New Zealand. It brings the three brands together with a stunning impact.

Video: NZOC

Sponsors

Ten years ago, had you told me that the ATC would be at the table of Visa, Coca-Cola, McDonalds, Kodak, AT&T, Adidas, Southcorp, the Bank of America and other multinationals I would have dismissed it as a dream.

It was no dream. Over the past five years, we have undertaken work with around 20 members of *The Olympic Program* (TOP Sponsors) and sponsors of National Olympic Committees. The result – US\$170 million in additional exposure for Australia. We went to the sponsors with the strange but simple proposition – we don't want your money. We just want to point out the benefits of promoting your brand and your Olympic sponsorship with Brand Australia. A few sponsors didn't get it. Many did and it was to their competitive advantage. We worked with many of these companies on promotions and competitions, sponsor hospitality packages, images of Australia for their advertising and travel packages to Australia.

The most significant relationship was established with Visa. I said earlier that the Games took the ATC to places and countries it had never been to before and could never afford to go to. Visa is probably the best example of this. Dozens of projects were undertaken with the multinational around the world. Television commercials screened around the world (I will show you one in a minute), travel offers went to millions of cardholders worldwide and supplements appeared in magazines - all under the slogan of "Australia prefers Visa". Another example, the Bund in Shanghai, the waterfront, for all of 2000 carried 46 backlit colour bus shelter size billboards featuring images of Australia. Visa spent millions promoting Australia and their association with the Games. I would now like to show you their worldwide advertisement "Kangaroo Dreaming" which ran worldwide in the six months leading up to the Games.

Video: Kangaroo dreaming

Broadcast rights-holders

Perhaps some of the most significant work was undertaken with the broadcast rights holders – the media organisations that paid out hundreds of millions of dollars, in some cases billions of dollars, to televise the Sydney Olympic Games.

These people were the most lucrative for Australian tourism and the toughest nuts to crack. Many thought, "here's another national tourist office banging on our door". It was only when we showed them how we could help with film, images, story ideas, contacts for talent, logistics, preview pieces, shoot location guides and so on that they started listening. The broadcast rights holders were perhaps the most significant target in all of our work. For two weeks, in every country around the world, these people would be showing a documentary about Australia built around the theme of the Olympic Games. It was important to us, indeed critical to us, that what they showed reflected our brand – a vibrant, friendly, welcoming, engaging, colourful and free spirited place with its own Australian style. When you've got a global audience of close to four billion people you want to get it right! When you go through the hours and hours of tape from the Games, I believe we achieved the result we were looking for and I am sure the results from our post-Games tracking research will show that, when it is released in a few months.

I can't estimate the amount of positive destination coverage that Australia received during the Games. It would run into the billions, maybe even trillions. However, I can tell you that in the 12 months leading up to the Games, the ATC hosted around 100 visits by 17 of the broadcast rights-holders. The value of the publicity generated through these visits totalled US\$300 million. That's just in one year from one section of the media. It was a remarkable result.

The most notable partnership was with NBC in America. It was one of the first partnerships formed and, with no disrespect to the others, the best partnership formed. NBC doesn't just broadcast the Olympic Games – it is a part of the team that make the Olympic Games happen. From the very outset, the President of NBC Sports, Dick Ebersol, recognised that viewers wanted to know about Australia – they wanted to learn about the land downunder. So he sent in an army to find out what made Australia tick and the result was astonishing. NBC's coverage of the Games was remarkable and brilliant and I think taught many Australians things they didn't know about their own country. Back in 1996 when the TV rights were being negotiated, as a part of the deal with Sydney, NBC would give Australia US\$6 million worth of free commercial airtime via a series of advertisements. Again, these advertisements linked the Olympic Brand, NBC brand and Brand Australia.

Video: NBC

Media

The Olympic Games generated enormous media interest in Australia. The Games were the hook that the media had been waiting for to come to Australia. The media were saying – the Games are on in Australia, let's find out more about this country. And they just didn't want to do the preparations for the Games, the normal tourist stories or delve into the social issues in Australia. They, like NBC, wanted to find out what made the country tick. They covered the food and the wine, the fashion, the arts, indigenous Australians, migrant Australians, the architecture, the lifestyle, the adventure, the weather – you name it, they did it.

In the five years leading up to the Games, the ATC probably hosted around 5,000 media representatives to Australia generating coverage well over US\$2 billion. In addition, we ran a proactive worldwide media relations campaign that handled around 50,000 inquiries from the media. This generated many more hundreds of millions of dollars in publicity for Australia. When the Olympic Torch arrived at Uluru, known to some of you as Ayers Rock, we brought 50 international media representatives in to cover that event alone. They then went on to do other pieces about Australia.

As the Games neared, we realised that we were undertaking what we think is the single biggest media relations program undertaken by any country for any event in history. However, the most significant part of the work was taken prior to the Games. During the Games, there is only one show in town and that's the Olympic Games and the sport that goes with it. During the Games, we primarily concentrated on ensuring that assistance was available for both the accredited and non accredited media when they wanted it. The Games were not the time to pitch the story – they were the time to make sure the media could do its work in the most convenient way possible.

While the media's interest in Australia in the lead-up to the Games was phenomenal, our challenge now is to keep that interest going. We accept that some of the interest will taper off but I am pleased to report that our PR network is saying that there remains a very high level of interest in Australia.

Corporate marketing

While the Games were primarily used by the ATC to promote Australia as a destination, we also used the Games to promote the ATC and inbound tourism in Australia.

Despite the fact that inbound tourism is Australia's fourth largest export sector, it fails to get the recognition it deserves from business, government and the media for its contribution to foreign exchange earnings, employment and spending. I think that perception may have changed for the better over the past few years thanks to the Olympic Games.

The ATC put a significant effort into taking tourism and what we were doing for the Games to politicians, business leaders, the media and the wider community. As time went on these people began to realise that tourism and the ATC were important players in "Sydney 2000 Inc." As a result, tourism now sits at many more political and business tables than it has before.

The five program areas: the Olympic Movement, sponsors, broadcast rights-holders, the media and corporate marketing all have delivered significant benefits to the ATC.

As is clear, the Games have delivered significant benefits to Australian tourism. I believe they have advanced Australia's brand by ten years, meaning what the world knows about Australia at the end of 2000 is what it would have known in 2010 had we not had the Games. The Olympic Games have added to the depth and dimension of the world's knowledge of Australia and will make us a contemporary destination. But just as important is that we, the ATC, take what we have learned through working with the Olympic Games and use it in the future. A smarter ATC is a great legacy of the Olympic Games.

RESULTS

Five years on, a lot of blood, sweat and tears on and an Olympic Games on, we are able to look back at the results the 2000 Games delivered for Australia. But as I have said many times today, the benefit hasn't come from just the conduct of the event itself, it comes with the decade of opportunity associated with a 17 day event. I often reminded my staff that the actual staging of the Olympic Games was the beginning rather than the end of the process.

Nonetheless, we can put some results up on the board at this time and I will run through them briefly as many became clear in my previous remarks. The ATC's Olympic Games Tourism Strategy delivered significant benefits to Australian tourism, the ATC and Australia as a whole:

- The Games are forecast to be responsible for attracting an additional 1.74 million visitors generating over US\$3.5 billion foreign exchange earnings between 1997 and 2004.
- In 2000, visitor arrivals to Australia increased by 11 per cent. This is a significant achievement. This was in part due to the ATC's "*Australia 2000 – fun and games*" campaign, launched in September 1999, to encourage visitation to Australia in 2000. This was aimed at insuring against avoidance, as has been the experience of other major event host cities and countries.

- At the conclusion of the Games, the ATC launched 90 tactical campaigns with 200 industry partners worth US\$25 million to quickly convert interest and awareness into actual visitation.
- In the three months after the Games, visitor arrivals to Australia increased by 15 per cent (in the quarter), creating an additional US\$320 million in foreign exchange earnings for Australia.
- *Brand Australia* has been advanced by ten years, meaning what the world today now knows about Australia, it wouldn't have known until 2010 had Sydney not hosted the Games.
- The ATC's media relations program generated an additional US\$2.1 billion in publicity for Australia between 1997 and 2000.
- The ATC's partnerships with major Olympic sponsors, such as Visa, McDonalds, Kodak and Coca-Cola, generated an additional US\$170 million in publicity for Australia.
- The likelihood of potential travellers to visit Australia increased significantly because of the Olympic Games.
- There was a 700 per cent increase in traffic to the ATC's Australian tourism portal – australia.com - during the Games. The number of pages of information downloaded from the site continues to be at record levels.
- The International Congress and Convention Association's predicts that Australia will be ranked as the number one country for meetings in 2001 - overtaking both the United States and the United Kingdom.
- An additional US\$56 million in export earnings in 2001 due to the ATC's *New Century, New World, Australia 2001* campaign to capture MICE business for Australia off the back of the Games.
- Over 5,000 unaccredited media representatives were serviced at the Sydney Media Centre, a joint venture between the ATC and Australian authorities, to cater for media not accredited to the Main Press Centre (MPC) or International Broadcast Centre (IBC)
- The ATC used the Games to host 50 of the world's most influential tourism people from 11 countries to visit Sydney for the Olympic Games.
- Research indicates that 88 per cent of the 110,000 international visitors who came to Australia for the Olympic Games are likely to return to Sydney as a tourist.
- Unaided awareness of the ATC within Australia increased by 25 per cent between 1999 and 2000.

I am sure you will agree that these are remarkable achievements based around one event, albeit the world's biggest peacetime event.

I mentioned briefly the results of research the ATC has carried out into the link between a consumer's inclination to travel and the Olympic Games. We are conducting further research at this time into how consumers attitudes have changed toward Australia. But over the past few years, and in some markets straight after the Games, we conducted some tracking research.

This research indicated a significant positive shift in the consumers inclination to holiday in Australia because of the Olympic Games.

Consumers were asked "Because Australia has been chosen to host the Olympic Games, are you more likely to consider going to Australia for a holiday sometime in the next four years".

In brief, the results were:

- | | |
|----------------------------|------------------------------|
| ■ India – 45 % increase | ■ Hong Kong – 19% increase |
| ■ Indonesia – 56% increase | ■ Japan – 24% increase |
| ■ Malaysia – 41% increase | ■ Korea – 15% increase |
| ■ Thailand – 43% increase | ■ USA – 24% increase |
| ■ China – 37% increase | ■ New Zealand – 17% increase |
| ■ Singapore – 27% increase | ■ England – 13% increase |
| ■ Taiwan – 26% increase | ■ Germany – 21% increase |

In the United States around 75 per cent of American travellers indicated they had seen pictures or stories in the media on Australia as a holiday destination as part of the Olympic Games coverage.

Americans indicated a number of reasons as to why the Games increased their interest in holidaying in Australia including a greater knowledge of the country, outdoor activities and scenery and a greater awareness of new or different aspects of Australia as well as the friendly Australian people.

As I said, the ATC is continuing to conduct market research into the effects of the Games and to evaluate post Games tactical campaigns.

LESSONS

Given what we set out to do, what we did do over those five years and the results achieved – we have learned many lessons that I believe will be of use to the ATC in the future and for any other country hosting major international events.

The lessons learned aren't rocket science – they're common sense and they have an evolutionary theme to them. I believe there are ten key lessons from hosting such a large scale event and they fall under four categories: foundations, relationships, style and issues. I will run through them briefly now:

1. In laying the foundations you have to start early and get a strategy. You can never hope to do this sort of work overnight. It takes a long time to build relationships, implement programs, work with different corporate cultures and brands, understand their array of planning and funding cycles and to get your internal systems and processes in order. You must also stick to that strategy. There's then old line "if it isn't in the strategy – don't do it". However, you must keep some flexibility as many good ideas come up, from within and externally, at the last minute.
2. Second, you must look internally and get your systems and processes right. You have the strategy now get the staff and the financial resources you need. As a part of this, ownership and accountability across the organisation are essential. We set up a specialist unit to coordinate our Olympic Games business – it was possibly the most significant thing we did.
3. With the foundations laid, you now have to start building relationships. You have to firstly get the cooperation of the organisers, in our case SOCOG and the Olympic Coordination Authority. You then have to get your government or financiers to buy in. In our case, the Australian Government granted us US\$6.7 million over four years for Olympic work. You then have to bring the industry together, share your vision and plans and get their cooperation. It is only after you have these three relationships established that you can then move into to the vast, complex and mysterious world of "Olympics Inc". You then have to start knocking on the doors of the National Olympic Committees and their ticket sellers, the sponsors – both worldwide and those of the NOCs, the broadcast rights holders and the media. I would estimate that in all of these overseas groups, there's somewhere in the vicinity of 1,000 organisations to deal with involving maybe 5,000 different individuals. That's enough to fill a small sporting arena! The relationships are critical; they have to be managed with the utmost care and a myriad of procedures and protocols have to be observed. Often there was frustration, more often than not there was joy and today we at the ATC, I think, have the best corporate contact book in the business.
4. The style with which you go about your work is critical. In short, you have to keep knocking on their doors. Many of these groups have never before dealt with the tourism industry and know little of what we have to offer. They assumed we came for money. We didn't. We were just looking to help and to add value to their financial commitment to the Olympic Games. Often, we would be told, "no we have no business with you". A few months later the same people would be on the phone, once it had clicked about how we could work together. The best way I can describe the relationship style is to be "nice but with intent". You also have to be smart as you are dealing with some of the biggest consumer goods and services and media companies in the world. It is their business to out-gun others.
5. The second aspect to style relates to what you can deliver. Again, referring to an old phrase - "under promise and over deliver". One of the key lessons we learned was not to over estimate the impact that the Games would have on tourism and Australia. At the same time, we did not go to the IOC, NOCs, sponsors, broadcast rights holders and the media promising the world. Some did and their corporate reputations are now damaged. Judging by the feedback to the ATC from many of the people we dealt with, I believe we over delivered.
6. The last aspect of style relates to the opportunity. The Olympic Games, for most countries, comes around only once in a lifetime. Australia last hosted the Games in 1956 in Melbourne and it was another 44 years before they were held in Sydney. I don't envisage

Sydney or Australia hosting the Games for at least another 30 to 50 years. So, it really is a once-in-a-lifetime opportunity. You have this chance, you have to do everything humanly possible to make the most of it or to use another old line "whatever it takes". The ATC and the Australian tourism industry put in many long hours to make the most of the Games. At times, this had a tremendous impact on our staff – they worked long hours, they were tired and they were stressed. This has to be managed very carefully. However, we all realised that we had to do it; what's more, we enjoyed doing it. Interestingly enough, we all thought the workload would ease after the Games. We were wrong. The pace is as frenetic as ever.

7. I will now look at some of the issues that have to be managed very carefully in relation to the tourism and the Olympic Games or any large event. The first issue to address is planning for avoidance. In 1998, our consumer tracking detected that some consumers may delay a trip to Australia that they had planned for 2000 because of the Olympic Games. As Sydney was the gateway to Australia, they thought their experience may be hampered by construction, profiteering, unavailability of flights and accommodation, crowds, protests and so on. This was a real issue for us. This is why we initiated the "*Australia 2000 – fun and games*" campaign to urge consumers to come to Australia in 2000 for fun and games and to be a part of the buzz that was occurring all over Australia, all year round. As it turned out, we had an 11 per cent increase in visitor numbers to Australia in 2000 and visitor numbers in the month of September, the month of the Games, were up by 15 per cent, although some parts of Australia suffered at Sydney's expense. But in big picture terms, the avoidance issue was addressed.
8. The second issue to be addressed was the balance between Olympic Games promotion and generic promotion. At no time did we have one without the other. Just as the organisation of the Games were overlayed on Sydney's infrastructure, so too were the Olympic Games overlayed into our normal advertising, media, publicity, internet, trade shows and consumer information programs.
9. Another issue for any city or country considering large scale events is the balance between generic visitation and event visitation. Events are a part of the tourism mix. However, too many events are a bad thing. They disrupt normal travel patterns and frustrate tourism operators around the world as they can't get accommodation, flights and other goods and services. Events are fantastic but there needs to be a balance.
10. Finally, don't let anyone think that an event has done the job for you in terms of promotion, the funding and policy support that you need to get visitors to your destination. I have said the Olympic Games were the best ever thing for Australian tourism. They were and I hope I have demonstrated the tangible and intangible benefits to you today. However, the Games were and will continue to be just one part of the ATC's business for the next few years. But we need to keep promoting and marketing our destination. Yes, we got billions of dollars in coverage for Australia. However interest and awareness doesn't equal conversion. We have to work harder than ever to convert that extremely high level of interest and awareness into actual visitation. To do that you need resources. The most sobering fact of the Games for Australia is that over the next four years, the Olympic Games promotional impact will drive an additional 1.1 million visitors to our shores. That's a great number but it has to be seen in context. Over the next four years, we expect a total of 24 million visits to Australia and those induced by the Olympic Games will represent only five per cent of the total visitation. The Olympic Games or any other event are a bonus and should not be a substitute for your normal business.

CONCLUSION

In conclusion, I would like to talk about the intangible things that the Olympic Games have done for Australian tourism. Something that we could never plan for – something that we are grateful for.

The Olympic Games have raised the world's expectations of Australian tourism. As a result, the industry must continue to deliver the high level of service provided to international visitors during the Games.

The Olympic Games has changed forever the world's view of Australia. The Games have raised the bar on all aspects of a holiday in Australia. From the service levels in hotels and restaurants to the friendliness and spirit of the Australian people.

What the world saw, heard and read about Sydney and Australia during the Olympic Games is what the international visitors of the first decade of the new century will expect. We need to be able to deliver on the promise of the world's best tourism experience.

Australia, Sydney and the Olympic Games were reported in glowing terms around the world including accolades from the media, athletes, business and the Olympic Movement. Australia showed the world that we could deliver the best ever Olympic Games - we now need to be able to deliver the best ever holiday experience.

Visitors will expect a festive atmosphere which Sydney experienced during the Games just as they will expect the high level of service provided by the Olympic volunteers. The bottom line is that we cannot afford for the holiday experiences of international visitors to fall short of the expectations they have of Australia.

The Olympic Games helped to clear misconceptions about Australia and added greater dimension to our international image. Before the Games, the world knew about the friendly Australian people and our great natural attractions. We are now known for our excellent organisational skills and first class infrastructure. This has many implications for tourism, particularly the multi billion dollar business tourism market, as well as the wider business community.

The Olympic Games had many implications for the industry, which need to be addressed. The Olympic Games added a different dimension to Australia as a holiday destination. We are now presented with the challenge to develop a new and refreshed tourism product to ensure we continue to capture the interest of international visitors.

We also need to adopt the spirit that was evident in the Olympic volunteer. The welcome that we extend our international visitors needs to be warm and genuine - similar to the way in which communities around our country welcomed the Olympic torch. In the lead-up to the Games, Australia undertook a major civic clean-up leaving a sparkling and impressive city. We must ensure our cities are "spick and span", as well as continue to make improvements to civic infrastructure.

During the Games we all tried a bit harder providing better service and greater attention to detail and it is important that the hospitality sector adopts this ethos. The industry can also learn from the problem solving skills illustrated by the Sydney 2000 organisers in the lead up to and during the Games. As an industry we need to get better at making a visitors experience in Australia as smooth as possible.

The Games illustrated the importance of strong partnership between Government and the private sector - a partnership which must be strengthened in the tourism industry.

On this point, I would like to make a few acknowledgements. We couldn't have had the tourism success we had and will continue to have without a great Olympic Games. His Excellency Juan Antonio Samaranch described them as the best Olympic Games ever. This is a great tribute to the people of Australia, the various organisers (SOCOG, The Olympic Coordination Authority, the Olympics Roads and Transport Authority), the volunteers, the police, the unions, the hundreds of private and public sector organisations that came together, the communities that hosted the torch and of course, the Olympic Movement.

The Australian tourism industry also came much closer together. The state and territory tourism authorities, the convention and visitors bureaux, the regional tourism authorities, the airlines, the industry associations, the hotels and many others all came together to make the most of the Olympic opportunity. The ATC couldn't have achieved what it has without their support.

Finally, I would like extend an invitation to all of you here today to visit Australia. Some of you have been before - I urge you to come again. I also urge first timers to make the commitment to visit Australia. Australia today is a different place as a result of the Olympic Games. While it has always been a friendly and welcoming place with some of the best natural attractions on the planet, it is now a more confident, cosmopolitan and worldly place. It is the world's best tourism experience. In inviting you to come to Australia, you might like to use the opportunity of the World Tourism Convention, to be held at the end of October and early November in Hobart, Tasmania. This island state is one of the most significant eco and adventure travel destinations in the world and according to all of the polls has the best temperate island in the world. It is a great place and we hope to see you there.

In 2000, Australia had fun and games. I urge you to now just come to Australia for the fun.

JOHN MORSE was appointed Managing Director of the ATC in January 1997. His major achievements include the development of a brand for Australia, a strategy of forming alliances with global companies and the creation of new opportunities to maximize the long-term tourism benefits of the Sydney 2000 Olympic Games. He also negotiated with China the recent acceptance of Australia as an Approved Destination, opening the door for the world's largest single source of potential visitors. Mr. Morse has 30 years experience in marketing and advertising. He began his work with the ATC in 1982 and has served as Regional Director for Europe and Regional Director for Asia.

ANNEX TWO

Summary of two special studies prepared for the conferencie

Introductory Report

by Prof. Peter Keller

Sport activities during the outbound holidays of Germans, the Dutch and the French

by IPK International

Sport and Tourism

1. GENERAL REMARKS

Sport and tourism are probably the two activities that have the greatest social and economic repercussion in the world today. They are also two powerful forces that unite people.

Participants in a sport give the best of themselves, and this in itself is a stimulus to others, to follow their example in making superhuman efforts and sacrifices, in order to achieve goals that appear to be unattainable.

Tourism is already a global industry. At the same time that tourism has improved the standard of living of the world's population, travel has become a necessity for society. What commenced as a simple desire to enjoy more leisure time, to enjoy the sun and the beach, has been converted into the principal means of having valuable, personal experiences and the possibility of becoming acquainted with, and understanding, other cultures.

The structured relation between both these sectors has only come into being recently, and will increase spectacularly in the near future. In order to study and develop these relations more in-depth, the World Tourism Organization and the International Olympic Committee agreed to hold a World Conference on Sport and Tourism in Barcelona, Spain in February 2001. It is to be hoped that this relation between Sport and Tourism will be far reaching, as much from the intellectual point of view as well from a practical standpoint, thus creating new opportunities for sustainable development.

International tourism arrivals reached a record 698 million international travellers worldwide in year 2000, and represented a total expenditure of more than US\$476 billion. Domestic travel could represent a movement of people several times greater.

The impact of the professional practice of sports has become a global phenomenon. Sportsmen and sportswomen in Athletics, Tennis, Basketball, Football, American Football, Baseball, Formula 1 racing, Cycling, and many other sports have become global heroes and role models in dressing, behaviour, opinions, etc. Besides that, amateur sport and leisure sport are becoming increasingly important in a stressed society to individuals that need ways of feeling themselves again.

The big sports events, like the Olympic Games, Athletics World Championships, or the Tour de France, are also a very important image effort for the city or the country organizing them, that will have its return, mainly, in the number of tourists that those destinations are able to attract in the coming years after the event takes place. And there are thousand of medium and minor sports events that, in every single case, foster the knowledge of the organizing city or region.

Sport is also becoming an important part of the product offer of tourism destinations. Huge tourist destinations are developing interesting product concepts around leisure sports that will allow them to differentiate their offer and to become more competitive at the international level, attracting customers that are eager for contact with nature, meeting other people and having a healthier and more interactive vacation. Professional sports are also the target for tourism destinations. They are building good, well equipped facilities, sometimes partly funded by the professional team or association, to allow professional teams to have training sessions and to practice their sport in suitable facilities, usually in a good climate. This is becoming a good business for tour operators and incoming travel agents.

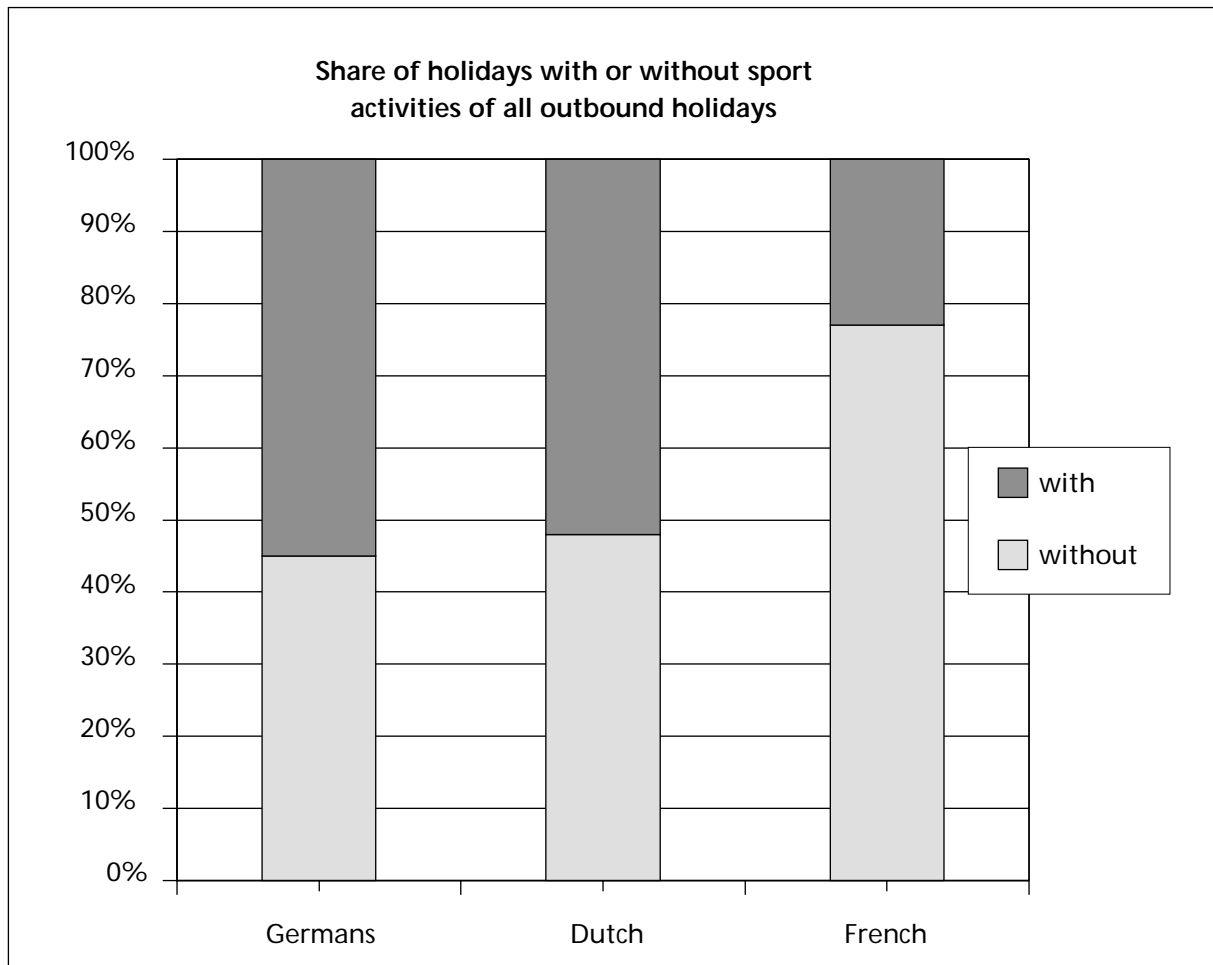
Both sports and tourism can become the key drivers for the development of a destination, but this has to be done in a weighted way. Sport-related trips accounted for 55% of the total outbound trips of the Germans, 52% of the Dutch and, they remained low in the case of French travellers at 23%. The size of the event or the tourism activity has to be in consonance with the possibilities and carrying capacity of the destination.

Large sports events constitute the best image campaign for a destination that wants to become a tourist destination. To consolidate this aim, a well planned effort in this specific aspect has to start well before the event takes place, and continue afterwards, in an organized manner.

Infrastructure can become the main bottleneck of a sports event or a tourism development. New forms of management should be developed to allow tourists access to sports infrastructures which already exist. Public authorities must play a key role in both cases, with a clear model of development in mind. As both activities deal with people and mobility, sustainability and environmental care are a must in those models.

Integration and consolidation of many of those activities in each sector is taking place, and the mutual knowledge and deepening of interests and relations between the two sectors can bring some unforeseen developments, alliances and partnerships in the future. Additional knowledge between the two sectors will bring new tourist products, new possibilities to practice sports, and even new sports. Informal and leisure sports practice is expected to grow in the future, and the same happens with tourism travel, either nationally or internationally. In this scenario, new and imaginative ways of dealing with this demand will appear in the coming years. Local communities must be involved and participate in those developments and, in all cases, well prepared professionals in both disciplines will be a need for the future.

2. SPORT ACTIVITIES DURING THE OUTBOUND HOLIDAYS



The World Tourism Organization (WTO) and the International Olympic Committee (IOC) commissioned the study "Sport activities during the outbound holidays of Germans, the Dutch and the French" from IPK International on the level and characteristics of the sport activities engaged in during holidays abroad. Germany, the Netherlands and France were chosen for this study. These countries ranked among the leaders in terms of international tourism expenditure in 1999. Even though this study does not cover all the major generating markets, it gives a clear picture of the importance of sport activities in tourism, and it makes many suggestions.

For the purpose of the study, the total trips were divided into "Holidays with more or less Sport Activities" and "Holidays without Sport Activities". Except in the case of French tourists, holidays more or less entailing sport activities account for more than half of the total trips, confirming our belief of the importance of sport.

Holidays with sport activities were then divided into "Sport-Oriented Holidays" in which the sport is the main focus of the trip, and "Less Sport-Oriented Holidays" in which sport is practised but has less significance. Each category was examined in more detail to find out what types of sport are favoured by holidaymakers.

This study also deals with many practical aspects, e.g. length of stay, expenditure, seasonal demand, booking patterns, accommodation, and consumer profiles such as gender, age, social status, and area of residence.

3.1 OVERVIEW

Whereas sport-related trips accounted for slightly more than 50% of the total outbound trips of the Germans and the Dutch, they remained low in the case of French travellers at 23%. Among sport-related holidays, the share of holiday trips directly centred on sport activities was high among Dutch travellers (43%), whereas French travellers favoured less sport-oriented holidays (85%).

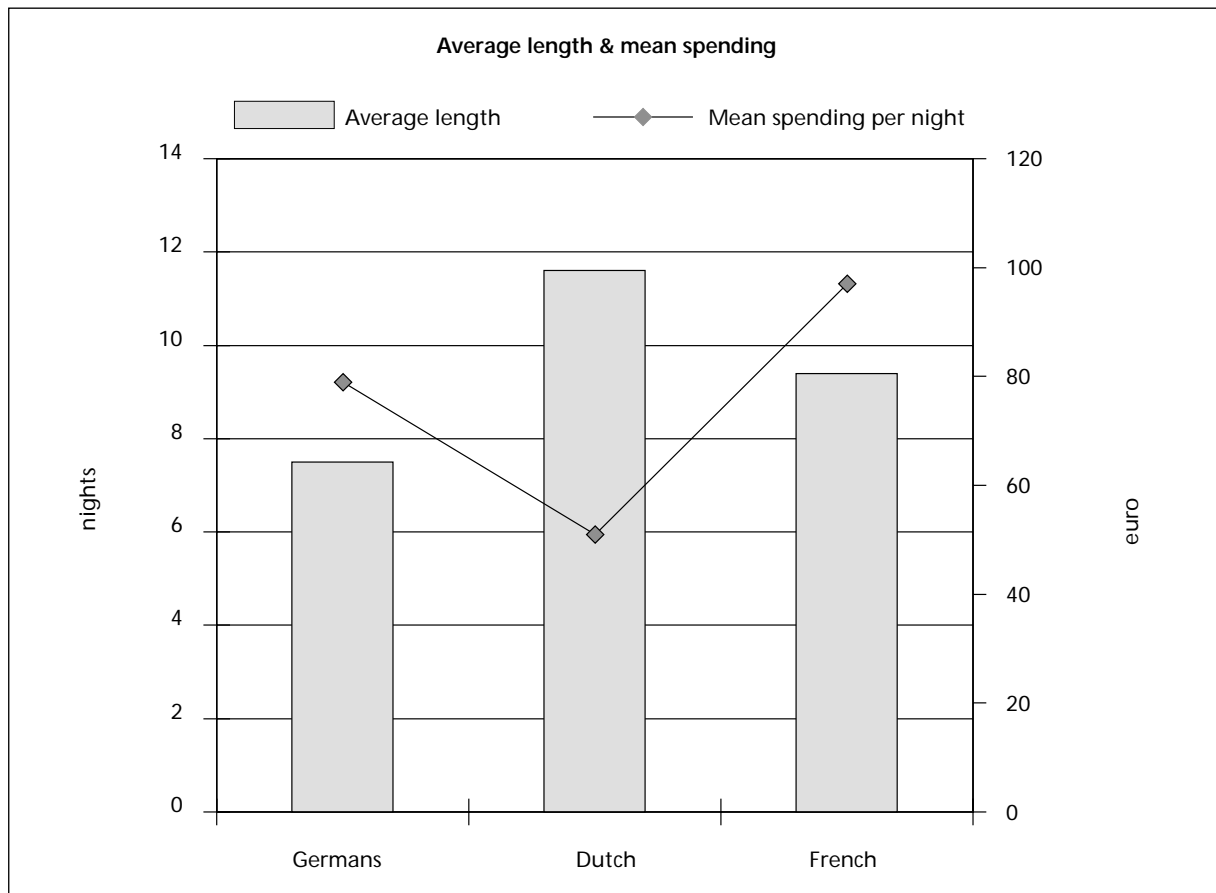
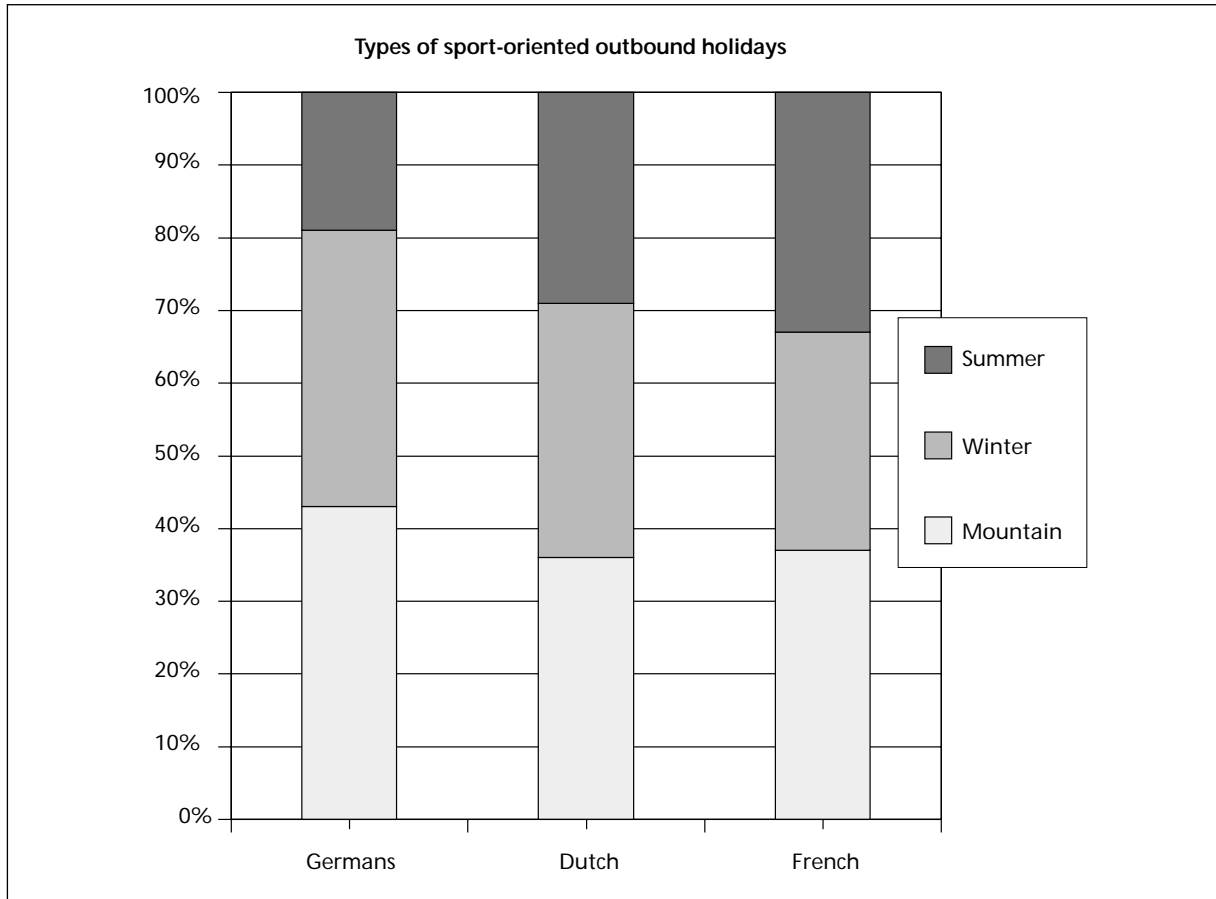
By differentiating among the more or less "sport-oriented" outbound holiday trips according to the significance of the sport/sport activity, the following distinctions can be made:

- "Sport-oriented" outbound holidays
(= holiday types where sport/sport activities play a larger role/are the focal point of the holidays)
- and "less sport-oriented" outbound holidays
(= holiday types where sport activities are practised to a certain extent, but sport is not the focal point of the holidays).

3.1.a Sport-oriented Holidays

Three types of sport-oriented holidays – summer sport holidays, winter sport holidays, mountain holidays – enjoyed similar popularity among French and Dutch travellers. Germans preferred mountain holidays (43%) to summer holidays (19%). Skiing and hiking/walking were the most popular sport activities among winter sport holiday-makers and mountain sport travellers, respectively. In the case of summer sport holidays, French travellers favoured diving/snorkelling, whereas Germans and Dutch were keen on hiking/walking.

Even though mean spending of the Dutch sport-oriented holiday-makers was low at 51 euros, they tend to take long stays (average length of stay was 11.6 nights). French travellers were the biggest spenders with mean expenditure of 1,010 euros per trip and 97 euros per night.

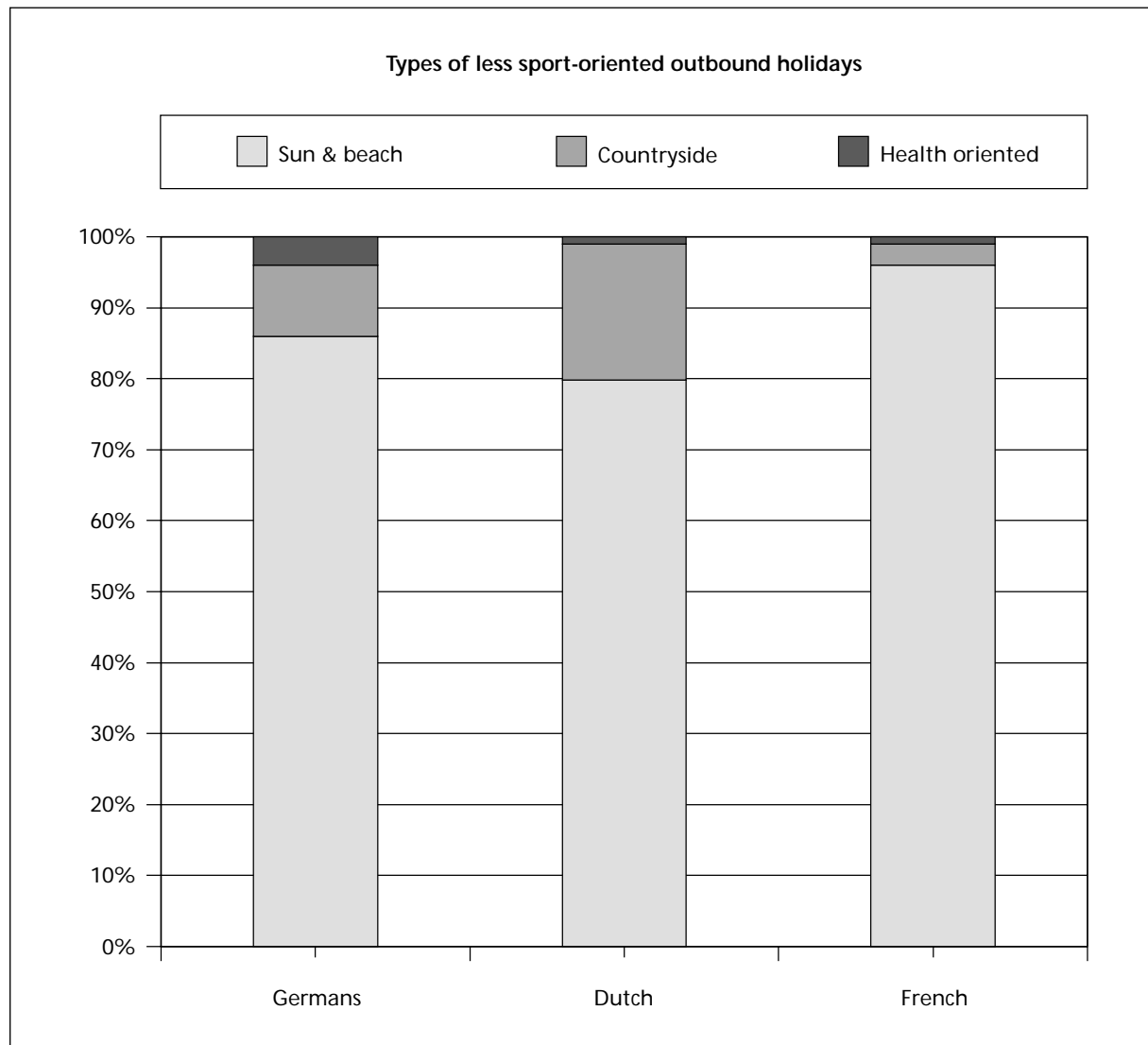


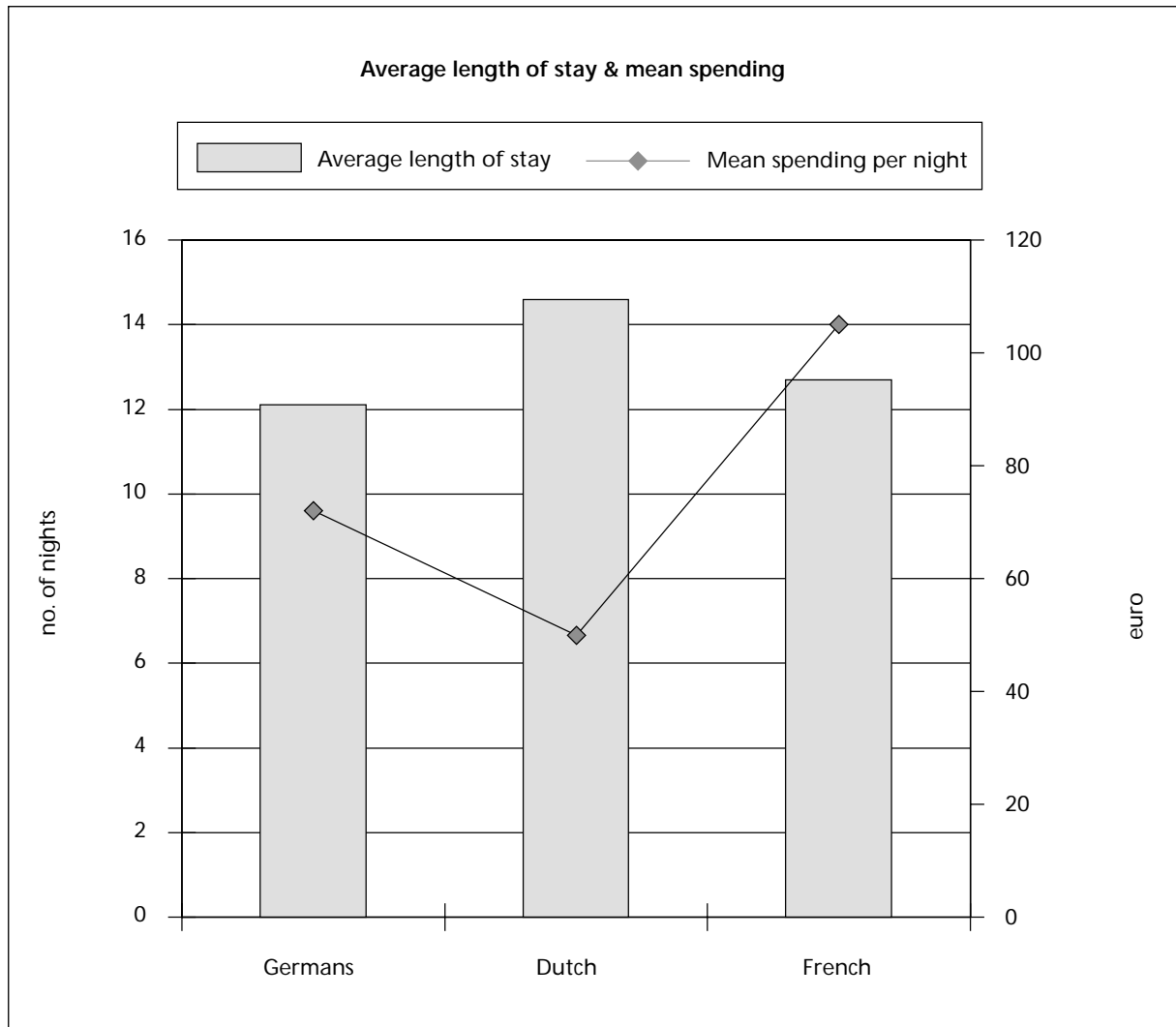
Source: IPK International – World Travel Monitor

For French and Dutch sport-oriented holiday-makers, May-August was the period most often chosen for going abroad, while Germans preferred the January-April season. A third of Dutch travellers went abroad without pre-booking, whereas only 17% of French travellers did so. The highest percentage of non-trade pre-booking was found among German travellers (50%). While Germans preferred to stay at hotels (58%), the Dutch liked to stay in other paid accommodation (60%). In all three countries, there were more male travellers than females. It was also mainly the higher income and education groups and large cities that generated most of these outbound flows. Austria was the most favoured destination among sport-oriented holidaymakers from the three countries. Spain however was the primary choice among French travellers.

3.1.b Less Sport-oriented Holidays

Sun and beach holidays accounted for most of the less sport-oriented holidays for all three countries. Almost all the French travellers chose sun and beach holidays (96%), whereas Dutch travellers also favoured recreational holidays in the countryside (19%) as the second choice. Swimming was generally the most popular sport among sun and beach holidaymakers, while hiking/walking was preferred by those taking recreational holidays and health-oriented holidays.





Source: IPK International – World Travel Monitor

In terms of both average length of stay and mean spending, less sport-oriented holidays outstripped sport-oriented holidays. Again, Dutch travellers stayed away the longest (14.6 nights), but spent the least (50 euros per night), whereas the average French traveller spent 105 euros per night.

More than a half the total trips from all three countries were made during the May – August season. For Dutch, less sport-oriented holidays were highly concentrated in this season (70%). More than a quarter (27%) of Dutch travellers went abroad without pre-booking, while this ratio was low among the Germans (18%) and the French (16%). Again, hotel accommodation was first choice among the Germans (51%), while fewer Dutch travellers (27%) stayed in hotels, preferring paid non-hotel accommodation (63%).

Similar numbers of males and females in all three countries participated in less sport-oriented holidays. The age groups were more or less evenly distributed. It was also common for the higher income and education groups and large cities to generate most of these outbound flows.

Spain was by far the most favoured destination among the less sport-oriented holiday-makers from the three countries.

3.2 COUNTRY PROFILE

3.2.a Germany

Of the 58 million outbound holiday trips taken by Germans in 1999, 32 million, or 55% of them, involved sport. "Sport-oriented" holidays accounted for 34% (11 million trips) of sport-related holidays and "less sport-oriented" holidays for 66% (21 million trips). The sport-oriented holidays are growing steadily, while the less sport-oriented holidays have levelled off.

"Sport-oriented" holidays were shared among summer sport holidays (19%), winter sport holidays (38%) and mountain holidays (43%). Hiking and mountaineering were the most popular activities for summer sport holidays, downhill skiing for winter sport holidays, and hiking/walking and rock climbing for mountain holidays.

An average sport-oriented holidaymaker stayed abroad 7.5 nights and spent 580 euros per trip. Forty-four percent of such holidays were taken between January and April. Of the 75% pre-bookings, 50% were made through direct contacts and 23% via trade. Trips taken without pre-booking accounted for a quarter of the total. Fifty-eight percent of the Germans stayed in hotels, other paid accommodation (28%), and non-paid (14%).

Slightly more men (55%) than women participated in sport-oriented holidays. Age groups were rather evenly distributed. Most sport-oriented holiday-makers were from higher income and education groups and large cities. Their main destinations were Austria (51%), Italy (19%) and Switzerland (9%).

"Less sport-oriented" holidays were dominated by sun and beach holidays (86%), whereas only small numbers took recreational holidays in the countryside (10%) and health-oriented holidays (4%). Swimming (82%) was the most popular sport activity among sun and beach holiday-makers, while hiking/walking and swimming were favoured by the other two categories.

The average less sport-oriented holiday-maker stayed abroad 12.1 nights and spent 860 euros per trip, both figures exceeding those of sport-oriented holidays. Fifty-seven percent of holidays of this type were taken during the warm season (May-August). Of the 82% pre-bookings, 63% were made via trade and 18% directly with individual contacts. Trips taken without pre-booking accounted for 18% of the total. Fifty-one percent of less sport-oriented holidaymakers stayed in hotels, other accommodation (36%), and non-paid accommodation (12%).

Similar numbers of males and females took less sport-oriented holidays. All age groups were quite distributed. The vast majority of less sport-oriented holiday-makers were from higher income and education groups and large cities. Their main destinations were Spain (32%) and Italy (14%).

German "sport-oriented" traveller profile. Main/preferred ...

- Gender: men (55%)
- Age: 35-44 years (22%)
- Social status: upper class (55%)
- Residence: large town/city (63%)
- Type of holiday: mountain (43%)
- Destination: Austria (51%)
- Length: 4 – 7 nights (45%)
- Spending: 250-499 euros (27%)
- Months: January-April (44%)
- Organization: pre-booking (75%)
- Accommodation: hotel (58%)

German "less sport-oriented" traveller profile. Main/ preferred ...

- Gender: men (52%)
- Age: 35-44 years (23%)
- Social status: upper class (51%)
- Residence: large town/city (63%)
- Type of holiday: sun & beach (86%)
- Destination: Spain (32%)
- Length: 7 or more nights (70%)
- Spending: 1,000-1,499 euros (22%)
- Months: May-August (57%)
- Organization: pre-booking (82%)
- Accommodation: hotel (51%)

3.2.b The Netherlands

Of the 13 million outbound holiday trips taken by the Dutch in 1999, more than half (52%) the total, or 7 million, contained sport characteristics. These sport-related holidays are divided into "less sport-oriented" holidays (57%, or 4 million trips) and "sport-oriented" holidays (43%, or 3 million trips). While the number of sport-oriented holidays is stable, that of less sport-oriented holidays is continuously rising.

"Sport-oriented" holidays were more or less evenly divided between summer sport holidays (29%), winter sport holidays (35%) and mountain holidays (36%). Hiking/walking, swimming and, cycling were the most popular activities for summer sport holidays, while downhill skiing and hiking/walking were favoured by winter sport holiday-makers and mountain holiday-makers, respectively.

The average Dutch sport-oriented holiday-maker stayed abroad rather a long time (11.6 nights) and spent little (592 euros) per trip in 1999. Almost half (46%) of the total trips were taken during May-August, followed by January-April (39%). Pre-bookings remained low at 67% - via trade 40% and non-trade 27%. One third of sport-oriented holidays were taken without pre-bookings. Hotel stays were low at 31%, whereas stays in other paid accommodation accounted for 60%. The percentage staying in free accommodation was 7%.

Slightly more male travellers than females participated in sport-oriented holidays in 1999. Age groups were evenly distributed. As in other cases, the vast majority were from higher income and education groups and large cities. Their main destinations were Austria (26%), France (24%) and Germany (16%).

Sun and beach holidays (79%) accounted for the lion's share of "less sport-oriented" holidays, followed by recreational holidays in the countryside (19%) and health-oriented holidays (1%). Swimming (78%) was the most popular sport activity for sun and beach holidays, while hiking/walking was favoured by recreational holiday-makers in the countryside.

The average less sport-oriented holiday-maker stayed abroad 14.6 nights and spent 719 euros per trip. More than two-thirds of the less sport-oriented holidays were taken during the warm season (May-August). Of the 73% pre-bookings, 62% were made via trade and only 10% directly with related entities. Trips taken without pre-booking accounted for more than a quarter (27%) of the total. Hotel stays were low at 27%, while other paid accommodation accounted for 63% of the total. Non-paid accommodation remained at 9%.

Slightly more male than female travellers participated in less sport-oriented holidays. Young and middle aged groups were more strongly represented than older age groups. Again, the vast majority of less sport-oriented holidaymakers came from higher income and education groups and large cities. Their main destinations were Spain (34%) and France (21%).

Dutch "sport-oriented" traveller profile. Main/preferred ...

- Gender: men (58%)
- Age: 25-34 years (22%)
- Social status: upper class (42%)
- Residence: large town/city (59%)
- Type of holiday: mountain (36%)
- Destination: Austria (26%)
- Length: 7 nights or more (62%)
- Spending: 250-499 euros (37%)
- Months: May-August (46%)
- Organization: pre-booking (70%)
- Accommodation: acc. paid for (60%)

Dutch "less sport-oriented" traveller profile. Main/preferred ...

- Gender: men (52%)
- Age: 25-44 years (22%)
- Social status: middle class (46%)
- Residence: large town/city (65%)
- Type of holiday: sun & beach (79%)
- Destination: Spain (34%)
- Length: 7 or more nights (81%)
- Spending: 250-499 euros (29%)
- Months: May-August (70%)
- Organization: pre-booking (73%)
- Accommodation: acc. paid for (63%)

3.2.c France

Of the 15 million outbound holiday trips taken by the French in 1999, only 3.5 million, or 23% of them, included sport characteristics. These sport-related holidays were dominated by "less sport-oriented" holidays (85%, or 3 million trips), while the "sport-oriented" holidays accounted for only 15% (0.5 million trips). While the number of "sport-oriented" holidays has remained stable, that of less sport-oriented holidays is growing continuously.

"Sport-oriented" holidays were divided evenly between summer sport holidays (33%), winter sport holidays (30%) and mountain holidays (37%). Diving/snorkelling and hiking were the most popular activities for summer sport holidays, downhill skiing and snowboarding for winter sport holidays, and hiking/walking among mountain holidays. The average sport-oriented holidaymaker stayed abroad 9.4 nights and spent 1,010 euros per trip. Half of the total trips were taken during May-August, followed by January-April (40%). Eighty-three percent of sport-oriented holidays were pre-booked - via trade 42% and non-trade 41%, respectively. Seventeen percent of the trips were taken without pre-bookings. Forty-two percent of the French sport-oriented outbound travellers stayed in hotels, other paid accommodation (48%), and non-paid accommodation (10%).

Male travellers and females were similar in numbers. Young and middle age groups were more interested in sport-oriented holidays than older groups. The vast majority came from higher income and education groups and large cities. Their main destinations were Spain (33%), Switzerland (19%), and Austria (17%).

Almost all "less sport-oriented" holidays were for sun and beach holidays (96%), followed by recreational holidays in the countryside (3%) and health-oriented holidays (1%). Swimming (86%) was the most popular sport activity of sun and beach holidaymakers, while hiking/walking was favoured for recreational holidays in the countryside.

The average less sport-oriented holidaymaker stayed abroad 12.7 nights and spent 1,310 euros per trip, both figures exceeding those of sport-oriented holidays. Fifty-seven percent of these holidays were taken during the warm season (May-August). Of the 84% of pre-bookings, 65% were made via trade and 20% directly with individual entities. Trips taken without pre-booking accounted for 16% of the total. Hotel (44%) were the preferred accommodation of French less sport-oriented holidaymakers, followed by other paid accommodation (38%), and non-paid accommodation (15%).

Slightly more male than female travellers took less sport-oriented holidays. All age groups were quite evenly distributed. The vast majority of the less sport-oriented holidaymakers were from higher income and education groups and large cities. The principal destinations were Spain (42%) and Tunisia (13%).

French "sport-oriented" traveller profile. Main/preferred ...

- Gender: men (59%)
- Age: 35-44 years (32%)
- Social status: middle class (44%)
- Residence: large town/city (56%)
- Type of holiday: mountain (37%)
- Destination: Spain (33%)
- Length: 4 or more nights (88%)
- Spending: 500-749 euros (26%)
- Months: May-August (51%)
- Organization: pre-booking (83%)
- Accommodation: acc. paid for (48%)

French "less sport-oriented" traveller profile. Main/preferred ...

- Gender: men (53%)
- Age: 35-44 years (21%)
- Social status: middle class (37%)
- Residence: large town/city (58%)
- Type of holiday: sun & beach (96%)
- Destination: Spain (42%)
- Length: 7 or more nights (68%)
- Spending: 1,000-1,499 euros (49%)
- Months: May-August (57%)
- Organization: pre-booking (84%)
- Accommodation: hotel (44%)

ANNEX THREE
Bibliography

BIBLIOGRAPHY

- Anderson, D. et al. (1989) Foundations of Canadian Physical Education, Recreation and Sports Studies, William C. Brown, Duqueque, Iowa, USA
- Bhatiz, A.K. (1991) International Tourism: Fundamentals and Practices, Sterling Press, New Delhi, India
- Brunet, F., *Economie des Jeux Olympiques de Barcelone 1992*, Barcelona: Centre d'Estudis Olímpics; Lausanne: CIO, cop. 1993, 163 p.
- Choi, Chang-Shin (1999) Benefiting from Mega Events: World Cup 2002, Presentation, 1999, Pacific/Asia Association Conference, Nagoya, Japan. Published in the Journal of Sports Tourism - Vol. 5 - No. 3
- Coltman, Michael (1989) Introduction to Travel and Tourism – An International Approach, Van Nostrand Reinhold, New York, USA
- Commonwealth of Australia (2000) Towards a National Sports Tourism Strategy - Draft. Sport and Tourism Division, Commonwealth Department of Industry, Sciences and Resources, Canberra City, Australia
- Commonwealth of Australia, Tourism Forecasting Council, The Olympic Effect, Canberra 1998
- Delpy, L., "Called for Travelling: the latest tourism industry research shows that sports travel is a big business", Sports Travel, Marina Del Rey, Calif., no. 2 (12), Dec. 1998,
- Dreyer, A. et al., Sporttourismus, Oldenbourg, München 1995
- ESADE, Centro de Dirección Turística, X Simposio Internacional de Turismo y Ocio. Barcelona, España, 2001
- Fayos-Sola, E., "The impact of mega events", Annals of Tourism Research, Oxford, England, no. 25 (1), 1998, pp. 241-245
- Fédération suisse du tourisme, Réseau national des pistes cyclables, résultats 1998/99, Berne 2000

- Feifer, Maxine (1985) *Tourism in History*, Stein & Day Publishers, New York, USA
- Fraleigh, Warren (1984) *Right Actions in Sport - Ethics for Contestants*, Human Kinetics Champaign, Illinois, USA
- Getz, D., "Trends, strategies and issues in sport-event tourism", *Sport Marketing Quarterly*, Morgantown, Va., no. 7 (2), June 1998, pp.8-13
- Gibson, H.-J., "Active sport tourism: who participates?", *Leisure Studies*, London, no. 17 (2), April 1998, pp. 155-170
- Gibson, H.-J., "Sport Tourism: a critical analysis of research", *Sport Management Review*, Melbourne, Australia, no. 1 (1), Nov. 1998, pp. 45-76
- Gibson, H.-J., "The wide world of sport-tourism", *Parks and Recreation*, Ashburn, Va., no. 33 (9), Sept. 1998, pp. 108-114
- Gunn, Clare (1988) *Tourism Planning*, Taylor & Francis Publishers, London, United Kingdom
- Heath, Ernie and Wall, Geoffrey (1992) *Marketing Tourism Destinations*, Wiley & Sons, New York, USA
- International Olympic Committee, 1894-1994: *The International Olympic Committee – One Hundred Years. The Idea – The Presidents – The Achievements*, Lausanne: IOC, 1996, 3 vol.
- International Olympic Committee, *Olympic Charter*, Lausanne: IOC, Sept. 2000
- IPK International – World Travel Monitor
- Keller, P., Smeral, E., *Increased International Competition, New Challenges for Tourism Policies in European Countries*, Background Paper, WTO, Salzburg 1997, p. 1-24
- Keller, P., *Globalisation*, in: W. Gartner et al., *Recreation, Leisure and Tourism*, CABI Publishing, New York 2000
- Keller, P., *Tourism and Employment*, International Tourism Policy, OECD 1995
- Korea Development Institute, *Impact of the Seoul Olympic Games on national development*, Korea Development Institute, Seoul, 1989, p. 102
- Kukawka, P., et al., *Albertville 1992: les enjeux olympiques*, Grenoble: Presses Universitaires de Grenoble, 1991, p. 183
- Kurtzman, Joseph (200A) *Economic Impact of Sport Tourism on the City*, Presentation, Sport and the City Conference, Indianapolis, Indiana, USA
- Kurtzman, Joseph (200B) *Sport and Tourism Relationships: A Unique Reality*, Presentation, First Australian Sports Tourism Symposium, Canberra City, Australia

- Kurtzman, Joseph and Zauhar, John (1999) Sport Tourism: Business Inherency or an Innate Compulsion (Visions in Leisure and Business - Vol. 17, No.2)
- Kurtzman, Joseph et al. (1993) Global Understanding Appreciation and Peace Through Sports and Tourism (Journal of Sports Tourism - Vol.1, No.1)
- Le Clair, Jill (1992) Sport and Physical Activity in the 90s, Thompsons Educational Publishing Inc., Toronto, Canada
- Les Cahiers de l'Espace, Tourisme et Sport, September 1997
- McCrory, M., "Special issue: Changing Faces of Tourism", Trends, Washington, no. 33(3), 1996
- McIntosh et al. (1995) Tourism Principles, Practices and Philosophies, Wiley & Sons, New York, USA
- Meyer, H., Economics of Olympic Games, Munich 2000
- Ministère de l'Équipement, des Transports et du Logement, *Secrétariat d'Etat au tourisme*, Le ski de fond en France, SEAMT, Paris 1999
- Papanikos, G.T., Tourism Impact of the 2004 Olympic Games, Athens 2004, Research Institute for tourism, Athens 1999
- PARKS, J.B., *Contemporary Sport Management*, Champaign, Ill., Human Kinetics, 1998
- Pigeassou, Charles (1997) Sport and Tourism: The Emergence of Sport into the Offer of Tourism - Between Passion and Reason (Journal of Sport Tourism - Vol. 4, No. 2)
- Preuss, H., Economics of the Olympic Games, Hosting the Games 1972-2000, Sydney 2000
- Research Unit, Sports Tourism International Council (1995) Sports Tourism Categories Revisited (Journal of Sports Tourism - Vol. 2, No. 3)
- Ronningen, A. , *Analyse de l'impact économique des XVIIes Jeux Olympiques d'hiver à Lillehammer en 1994*, Lausanne, CIO, mars 1997
- Rütter, H., Economic Importance of Sports, Zurich 2000
- Sports Tourism International Council. Journal of Sport Tourism, 1993 – 2000
- Standeven, J., *Sport Tourism*, Champaign: Human Kinetics, 1999, p. 366
- Stettler, J., Sport und Verkehr: *Sportmoviertes Verkehrsverhalten der Schweizer Bevölkerung Umweltbelastung un Lösungsmöglichkeiten*, Bern: FIF Universität Bern, 1997, p. 387
- Tourism Forecasting Council, *The Olympic Effect : a Report on the potential tourism impact of the Sydney 2000 Games*, Canberra: Tourism Forecasting Council, 1999, p. 65

- Tourisme et sport, Cahiers d'espaces, No. 52, Paris: Espaces, 1997, p. 192
- Turco, D. & Eisenhart, H., "Exploring the sport-tourism connection", Journal of the International Council for Health, Physical Education, Recreation, Sport and Dance, Reston, Va., No. 34 (2) Winter 1998, pp. 24-27
- Universidad Autonoma de Barcelona, Centre d'Estudis Olímpics I de l'Esport, *The keys to success: the social, sporting, economic and communications impact of Barcelona '92*, Bellaterra: Universidad Autonoma de Barcelona; Lausanne: Olympic Museum, cop. 1995, p. 282
- Whitson, D. & Macintosh, D., "The Global Circus: international sport, tourism and the marketing cities", Journal of Sport and Social Issues, Thousand Oaks, Calif., no. 20 (3) Aug. 1996, pp. 278-295
- WTO, Basic Documents, Madrid 2000
- WTO, Global Code of Ethics for Tourism, Santiago de Chile 1999
- WTO, The Tourism Satellite Account, Madrid 1999
- WTO, Tourism 2020 Vision, seven volumes, Madrid 2001
- WTO, Tourism Market Trends, Edition 2001, Madrid 2001