



Demand for Lodging and Tourism

INTRODUCTION

As noted in the first chapter, tourism is a huge global phenomenon, which with only a few notable exceptions, continues to grow each year. At any given moment there are millions of people undertaking leisure or business trips in all corners of the world. With these millions of travelers, there are likewise millions of purposes and thousands of motives for undertaking their journeys. Years of scholarly research have shown that different people travel for different reasons—to fulfill a variety of psychological, emotional, physical, or economic needs. Because everyone is different and might be motivated differently, and they come from different places, the tourism product sought varies from person to person and place to place. Thus, motives and interests, coupled with what the destination has to offer potential visitors, create an array of tourism types and market types that can be divided and subdivided for the purposes of marketing planning and research.

In addition, demand, or the consumption of the tourism product, is not uniform through time and space. Thus, certain places have different patterns of demand at different times of the year. Likewise, global forces that cannot always be predicted, and some that can, are at play in causing people to avoid or flock to certain destinations. Understanding tourism demand is very important for marketing, regional tourism planning, and managing attractions and other services (e.g. transportation and accommodations). This chapter examines tourism demand, what it is, how it is changed via ‘demand shifters’, and how understanding patterns of demand is crucial for tourism planning and development.

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DEMAND FOR TOURISM AND LODGING SERVICES

Demand for tourism refers to the consumption of tourism products. The supply side of tourism and lodging is not the focus of this chapter but is the focus of the majority of the next 14 chapters that follow. Demand entails the travelers themselves, intermediaries (e.g. travel agents and tour operators), and service suppliers consuming or purchasing products and services that make the travel experience possible. Tourists buying food, train tickets, souvenirs, and hotel nights is an example of demand; travelers in this sense are consuming the supply of tourism directly. Tour operators also form part of the demand for tourism as they too purchase products from suppliers such as airlines, motor coaches, hotels, and dining establishments. Likewise, airlines, hotels, and other direct suppliers are equally important consumers because they purchase petroleum, bathroom supplies, food and drinks, laundry services, and so on. Thus, the tourism demand system is as complex as the supply system; it involves many levels of consumption and entails more than just tourists staying in hotels or dining in cafés. Nonetheless, this chapter focuses primarily on the tourist and his/her role in the demand side of tourism.

Worldwide, there has been significant growth in demand for international travel since the mid-1900s. With the close of the Second World War and the technological advancements in long-distance air transportation that developed during and after the war (e.g. larger and more efficient airplanes), air ticket costs became more within reach of the average traveler. As a result, the world opened up to greater flows of people. During the 1990s and early 2000s, international travel has seen an annual growth rate of between 4 and 7%, depending on the year and economic and political forces at play. Since 2000, international travel has grown by nearly 30% (Table 2.1). Between 1950 and 2007, in only 57 years, international arrivals have

Table 2.1 Growth of International Tourist Arrivals Since the Second World War

1950	25 million
1960	69 million
1970	166 million
1980	288 million
1990	457 million
2000	698 million
2007	903 million

Source: UNWTO (2008).

multiplied more than 35 times. Few other industries have realized such rapid and widespread growth.

Although nearly a billion international tourist trips is remarkable and noteworthy, domestic travel, which is much harder to measure and estimate, increases global tourism totals by several times. Mid-2000s industry estimates in the United States, where domestic travel is a very important part of tourism demand, place the number of domestic trips at around two billion. Approximately 44% of lodging nights in the US were spent by business travelers, while 56% were spent by leisure tourists. Most leisure hotel guests travel by car, are aged 35–54, make reservations ahead of time and pay an average of \$109 per room per night. From a business traveler perspective, 41% spend three or more nights at a hotel. In contrast, only 28% of leisure travelers spend three or more nights (American Hotel and Lodging Association, 2008).

There are also some interesting geographical patterns associated with growing global demand for tourism. For instance, in 1950, the top 15 destination countries in the world accounted for approximately 98% of all international tourist arrivals. In 1970, this had fallen to 75%, while in 2007 the top 15 destinations absorbed only 57% of all arrivals (UNWTO, 2008). These changes reflect the materialization of new destinations in the developing world and in peripheral regions. As more places open up to tourism, demand is spread to other destinations, breaking the monopoly traditionally held by only a handful of countries. This is particularly important in the past 20 years as tourists have expressed a lack of interest in the 'same old places' and a surge of interest in discovering places that have been heretofore relatively unexplored, including destinations such as Antarctica, and many countries in Asia, Africa, and Latin America. Countries such as Vietnam and Cambodia, which were

Table 2.2 Countries Expected to Grow their Tourism Economies Fastest in 2008

Rank	Country	Real Tourism GDP Growth %
1	Macau	23.8
2	Montenegro	17.0
3	Seychelles	14.1
4	Angola	13.7
5	Reunion	13.7
6	United Arab Emirates	13.5
7	Libya	13.2
8	Azerbaijan	11.4
9	China	11.3
10	Romania	9.3

Source: WTTC (2008).

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until recently relatively unexplored by tourists and under strict communist control, have become popular destinations. Table 2.2 lists the countries that were expected to experience the most relative tourism-based economic growth in their GDPs in 2008, which is reflective of the point that new countries are becoming tourist destinations as the world continues to open up to tourism. As denoted in Table 2.2, Angola, Libya, and Azerbaijan are good examples of this change in global demand for new and different destinations. The World Travel and Tourism Council projects that between 2008 and 2018, other countries that traditionally have not been chief destinations will be listed as among the fastest growing and largest tourism-based economies, based on arrivals, employment, and relative growth in tourism GDP. These include Namibia, Vietnam, Vanuatu, Sao Tome and Principe, Cape Verde, Brunei, Qatar, Montenegro, Rwanda, Chile, and Romania.

As of 2007, the fastest growing tourism regions in the world are the Middle East, Southeast Asia, Northeast Asia, and Central America, as measured by international arrivals (Table 2.3). The Middle East experienced a remarkable growth of 16.4%, with most of this being shored up by increased arrivals to Egypt, Saudi Arabia, and the United Arab Emirates. Southeast Asia's tourist arrivals grew by 12.2%, reflecting in part the increasing popularity of Vietnam, Cambodia, and Malaysia as tourist destinations. Arrivals in 2007 in Northeast Asia exceeded 2006 numbers by nearly 11%, with Macau demonstrating the highest growth—an astonishing 21%. Japan experienced a 13% growth in one year, and a 10% growth was recorded for China. Central America's extraordinary 10% growth reflected notable enlargement in demand for Costa Rica, Honduras, and Panama.

It is also interesting and useful to examine where the demand comes from, not just where it goes. Table 2.4 shows the origins of people who travel for personal/leisure reasons in the order of how much is spent on travel. American tourists together spend more than any other individual nation, exceeding the second ranked country, Japan, by more than three times. China's position in the top ten demonstrates its burgeoning middle class, which can now afford to travel and which has benefited from the Chinese government's Approved Destination Status—a list of countries the Chinese are permitted to visit on holiday vacations, which continues to expand each year. Mexico's inclusion on the top-ten list also testifies to the growing affluence in that country and the high priority Mexicans place on international travel. Table 2.5 similarly shows expenditures on business-related travel. Not surprisingly, most states on the personal top-ten list also have a place on the business travel top-ten list. There has always been a positive relationship between pleasure- and business-oriented travel, as one tends to support the other.

Table 2.3 International Arrivals by Sub-region, 2007

Sub-region	International Arrivals 1990 (millions)	International Arrivals 1995 (millions)	International Arrivals 2000 (millions)	International Arrivals 2005 (millions)	International Arrivals 2007 (millions)	Growth between 2006 and 2007 (%)
EUROPE						
Northern Europe	28.6	35.8	43.7	52.8	57.6	2.2
Western Europe	108.6	112.2	139.7	142.4	154.9	3.6
Central/Eastern Europe	31.5	60.6	69.4	87.8	95.6	4.5
Southern Europe	93.9	102.7	140.8	157.3	176.2	7.0
ASIA AND THE PACIFIC						
Northeast Asia	26.4	41.3	58.3	87.5	104.2	10.6
Southeast Asia	21.1	28.2	35.6	48.5	59.6	12.2
Oceania	5.2	8.1	9.2	10.5	10.7	1.7
South Asia	3.2	4.2	6.1	8.1	9.8	8.2
AMERICAS						
North America	71.7	80.7	91.5	89.9	95.3	5.2
Caribbean	11.4	14.0	17.1	18.8	19.5	0.1
Central America	1.9	2.6	4.3	6.4	7.7	9.6
South America	7.7	11.7	15.3	18.2	19.9	6.4
AFRICA						
North Africa	8.4	7.3	10.2	13.9	16.3	7.9
Subsaharan Africa	6.8	12.8	17.7	23.3	28.2	7.1
MIDDLE EAST						
Middle East	9.6	13.7	24.4	37.8	47.6	16.4

Source: UNWTO (2008).

These global patterns are important to understand when considering the lodging needs of travelers. Most of the data presented above are based on overnight trips. The World Tourism Organization defines a tourist as someone who travels away from home and spends at least one night in the destination. While international and domestic day trips are an important part of tourism, they are not typically counted in international arrivals data. As a result, tourists undertaking these millions (or billions in a domestic context) of overnight trips require places to stay, so the relevance of lodging in this context is clear. For this reason, there has also been a concomitant increase of lodging facilities of various sorts throughout the world. These are discussed in greater detail in the second half of the book.

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Table 2.4 Top Ten Personal Traveler Origin Countries by Expenditures, 2008

Rank	Country	Billions of \$ US on Personal Travel
1	United States	889.5
2	Japan	274.4
3	United Kingdom	208.1
4	Germany	201.8
5	France	170.9
6	China	167.5
7	Italy	127.1
8	Spain	123.9
9	Canada	95.8
10	Mexico	77.1

Source: WTTC (2008).

Table 2.5 Top Ten Business Traveler Origin Countries by Expenditures, 2008

Rank	Country	Billions of \$ US on Business Travel
1	United States	190.1
2	Japan	70.2
3	China	65.8
4	Germany	62.1
5	United Kingdom	51.1
6	France	43.3
7	Italy	40.3
8	Spain	21.7
9	Canada	20.2
10	Brazil	15.5

Source: WTTC (2008).

To illustrate the lodging impact of international travelers, their demand for lodging in the USA, one of the world's top destinations, can be examined briefly. Almost 19 million overseas travelers and nine million Canadians spent at least one night in the United States in 2007, accounting for some 22% of all room nights in the country. The average length of stay for overseas visitors was 7.9 nights with the main motives being leisure/holiday (53%) and business (35%). Most foreigners visited more than one state (average 1.6) and traveled by taxis (49%), rental cars (33%), and air (27%) (American Hotel and Lodging Association, 2008).

TRAVEL MOTIVES AND ACCOMMODATION SELECTION

To understand tourism demand, one must understand people's motives for traveling. There are nearly as many motives as there are travelers, but the primary underlying stimuli include the need to belong, seeking self fulfillment, spiritual growth, getting away from mundane environments at home, escaping inclement weather, psychological renewal, and altruism, to name just a few. These motives (push factors), when viewed together with what the destination has to offer (pull factors), result in various types of tourism and types of tourists. For example, people who travel to seek spiritual renewal or fulfill a religious obligation participate in 'religious tourism' and are known as religious tourists or pilgrims. People who want to enjoy nature but exact minimal impacts on the environment are referred to as ecotourists. There are many such types of tourism and tourist, too many to elaborate on here, but several will be described briefly and how they relate to demand for accommodation.

The largest tourist gatherings in the world are religious in nature—the hajj in Mecca, Saudi Arabia, the Kumbh Mela in India, and several others. Tens of millions of people attend the Kumbh Mela events every few years, and every year more than two million people undertake the hajj pilgrimage. While the poor who attend these religious events tend to stay in tents or pilgrim rest houses, there is a growing demand for hotels and guesthouses. International hotels, such as InterContinental and Ramada, have found favor in Mecca among wealthy Muslims undertaking the pilgrimage.

Ecotourists, or those who travel for enjoyment but also with an educational, altruistic, or environmental solidarity purpose, often select ecolodges or ecohotels that practice environmentally sensitive energy, waste management, and supply chain procedures. People whose primary desire is to get away from home to avoid bad weather, to relax, or simply to do nothing at all, typically elect to stay at a beach resort or take a cruise.

Outdoors enthusiasts usually choose camping, cabins, or ski lodges as their lodging medium because this allows them to be closer to nature and the outdoors. Tourists with an



Modern-day pilgrims at the Ganges River, Varanasi, India



Beach resort area on the Caribbean island of Anguilla

interest in rural areas and agricultural heritage often select farm stays or dude ranches as their preferred accommodations. Likewise, business travelers typically prefer high-class, brand-name hotels located either in urban centers or near airports. Road-based travelers have a tendency to stay in hotels or motels located near major thoroughfares, while youth and educational tourists usually stay in hostels, dormitories, or campgrounds. People who travel to gamble usually end up staying in casino resorts or casino hotels, and of course VFR (visiting friends and relatives) travelers are more inclined to stay in private residences. Clearly there are

direct relationships between travel motives or type of tourism, and the most common lodging choice.

DEMAND SHIFTERS

So far this chapter has illustrated the immensity of tourism and lodging demand. However, it should also be made clear that demand for accommodation services is not uniform, balanced or in any way absolute. Tourism demand is fickle, fluctuating quickly, and inconsistent with economic, social, political, and environmental changes. Forces that alter demand, both up or down, are known as demand shifters and can take on any number of forms such as terrorism, increased unemployment, or demographic changes.

One of the most common shifters is special events and holidays. These can include festivals, public holidays, school breaks, sporting events, or other periodic occurrences that increase demand for places and products. Mega sporting events, such as the World Cup, the Olympics, the World Series (baseball), and the Super Bowl (American football), are extremely popular events that draw tens of thousands of people physically to a place and deliver considerable media exposure to others. Communities throughout the world compete to host such large-scale events because of the numbers of tourists they produce. Accommodation properties are perhaps the most affected by big events and festivals, and sometimes new properties are erected specifically to facilitate an expected influx of visitors.

Changing demographics is another demand shifter that is especially pertinent today with the retirement of baby boomers, who are living longer and are more affluent than their parents. These two variables alone (longevity and affluence) are part of the reason for the rapid growth in tourism, especially special niche forms of tourism such as adventure tours, ecotours, educational travel, genealogy-based journeys, and other forms of heritage tourism. Market research has shown that since the 1990s, retirees today are demanding higher levels of physical activity and adventure in their expectations and behaviors. Other demographic changes, such as immigration and ethnic composition, are having a significant impact on tourism demand as well. For instance, with escalating numbers of Hispanic Americans in the United States, there is a higher tendency for the populations of the southwestern states (e.g. California, Arizona, Nevada, New Mexico, and Texas) to travel back to Latin America on vacation to visit family and friends. Likewise, smaller family sizes since the 1950s have allowed more families to go on longer distance holidays more frequently.

In terms of economic trends, it is fairly obvious that when unemployment rates rise, travel declines. Travel is considered a dispensable luxury good during times of economic hardship. The current global economic crisis (2007–2009) is illustrative of this, as many people have cut travel completely out of their budgets until the economy begins to stabilize. Millions of people have recently lost their jobs and their homes; in these dire circumstances, travel is one of the first items to be trimmed from the family budget. As well, there is a direct correlation between currency exchange rates and international travel. When rates are favorable people will travel abroad. When exchange rates become unfavorable, travel slows down. Personal holiday travel is the most elastic in relation to exchange rates; business travel on the other hand tends to remain fairly constant during periods of currency devaluation.

Political circumstances also have a profound influence on demand for tourism. As already noted, an extreme example is terrorism and war. These have obvious downturn effects not only in the countries where the conflicts occur but also in their broader regions and throughout the entire world. One of the most momentous political shifters during the past two decades was the collapse of state socialism (communism) in Eastern and Central Europe. With the fall of communism in countries like Poland, Czech Republic, Bulgaria, Romania, Serbia, Albania, and the successor states of the former Soviet Union, there has been a huge influx of tourists to these countries. This fact elevated several of them to the World Tourism Organization's list of top 20 destinations because of the newfound freedom to visit there. People of Polish or Romanian decent living abroad could now visit their homelands freely without fear of detainment or government harassment. Many

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emigrants from the region who left following World War II were not permitted to return or they might face imprisonment in some cases. The disintegration of the communist system has created a huge global demand for the countries of Eastern Europe. Mongolia, China, Vietnam, and Cambodia have faced similar changes in Asia. Even though China, Cambodia, and Vietnam remain communist states, they have adopted economic systems that resemble capitalism; they welcome foreign visitors and are encouraging tourism growth, something the European communist states did not do.

Other political issues relate to travel restrictions, passports, and visas. In 2003, the Department of Homeland Security began requiring a transit visa for all passengers transferring between flights in US airports, even if they do not leave the airport building. This is only one of several new regulations initiated to fight the threat of terrorism. This has been a point of contention between the US and many of its allies. Citizens of most Latin American, Caribbean, Asian, African, and Pacific Island countries must now obtain a US transit visa to change airplanes in a US airport, even if their layover is an hour or less.

As part of its national security measures, the US government recently ratified a law that will require passports for all travel into and out of the United States, including by foot and car to Mexico and Canada. Canadians have always been permitted to enter the US on only proof of citizenship (e.g. birth certificate) and vice versa. Americans have long been able to visit Mexico without a passport. However, now passports will be required to re-enter the United States for everyone. At the time of writing, Americans could still enter the US by land or sea from Bermuda, the Caribbean, Mexico or Canada, using only a photo ID and birth certificate. After June 2009, however, all entrances into the country will require a valid passport. The governments of Canada, Mexico, and the Caribbean islands have protested the US government's decision, suggesting that such a passport requirement (only about one quarter of Americans possesses a valid passport) will create a huge drop in demand for regional tourism. For many Americans, travel to Canada, Mexico, and the Caribbean before 2008 was feasible because passports were unnecessary.

Seasonality

Seasonal changes in demand for tourism and accommodations are known as seasonality. There are two primary types of seasonality, namely natural and institutional. Natural seasonality is caused by naturally occurring demand shifters, such as weather and climatic patterns. Institutional seasonality happens as a result of human-induced variables, such as school breaks and summer vacations, public holidays, and special events. Low season occurs

when demand for destinations and products is down. From a socio-economic perspective this is seen as one of the negative sides of tourism because it usually results in layoffs and other staff reductions, and it also means less tax and regional income. Lodging properties can do several things, including special events and offer special discounts to try to counter the effects of low season (this is discussed in greater detail in Chapter 4). Seasonal changes can be seen easily in the form of bar or line graphs. Figure 2.1 shows seasonal variations in demand among tourist arrivals in Sri Lanka. It is clear that Sri Lanka is in high demand between



A hotel in New Hampshire, USA, experiencing low season

November and February, with the peak months being December and January. Of course this is a result of the country's tropical warm weather, which appeals to tourists from Europe and other cold climes during the northern winter. During the summer months and monsoon periods there is considerably lower demand for the island's tourism product.

Colder climates, such as parts of Canada and Norway, typically have their high season in summer, when the weather is pleasant and warm. Winters are low seasons because of the cold and darkness associated with their northern locations. However, even in cold-weather climates there tends to be a bump in demand during the winter season, which reflects the popularity of winter sports (e.g. skiing) in many cold-climate destinations.

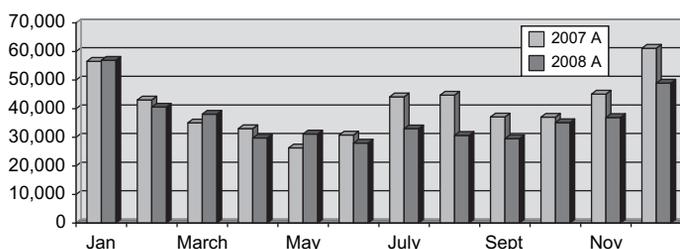


FIGURE 2.1 Monthly tourist arrivals in Sri Lanka, 2007–2008.
Source: Sri Lanka Tourism Board (2009).

MARKET SEGMENTATION

Demand for tourism and lodging can be studied from three or four main perspectives, including geographically as noted earlier, psychographically, demographically, and according to visitor behavior. Breaking the market into these categories is known as market segmentation. Segmentation is an important and very useful tool in understanding what consumers desire, how they behave, what they consume, and where they are from. All of these have salient implications for marketing and research.

The goal of geographic market segmentation is to understand visitor/guest origins. The most common question asked in this regard is where they are from. This allows destinations and accommodation facilities to decide their largest 'catchment area', or the region from which most of their visitors derive. This has long been an important approach to understand demand and catering to the needs of prominent markets. This is often broken down in aggregate into international and domestic markets. Likewise, individual businesses, such as attractions, restaurants, and ski resorts often divide their geographic market into local and non-local consumers.

Some observers suggest that geographic segmentation is losing some of its relevance with the rapid development of e-commerce and Internet-based advertising, because catchment areas can now be viewed as the entire world. Traditional political boundaries have therefore been breached and are slightly less relevant in today's e-commerce-oriented marketplace. Nonetheless, most destinations still desire to understand this important aspect of their markets. This is particularly true as new countries open up to global travel by way of increased affluence and greater political freedom to travel. China and India, demographically the two largest countries in the world, fall into these categories and are becoming key markets for global tourism. According to estimates by various international organizations, both countries will continue generating international tourists at high rates of growth far into the future.

Psychographic and behavioral segmentation assists planners and marketers in understanding demand as it manifests in visitor expectations, lifestyles, attitudes, values, desires, activities, motives, and behaviors. This is particularly important in the lodging sector, for different guests have different expectations regarding cleanliness, service quality, brand loyalty, and a wide range of other variables that can influence their experiences at a property and the way the property needs to be managed.

Demographic classifications are important in understanding the age, gender, marital status, sexual orientation, income, family size, occupation, level of education, race and ethnicity, religion, and social class of guests and potential guests. Many of these have a bearing on the types of lodging

facilities they will choose. It seems obvious that people with low incomes will elect to stay at generally inexpensive properties, such as motels or campgrounds. Large families might be required to purchase two rooms for the night. Gay and lesbian travelers will probably select a hotel, resort, or cruise that is gay-friendly. Honeymooners or older couples might decide on a quiet location devoid of a mass party atmosphere. Certain religious adherents might choose one hotel over another if a prayer room is provided or if the kitchen can cater to their unique dietary needs. Once the demographic characteristics of a lodging facility's primary market(s) are known and understood, these issues can be highlighted in their promotional materials and on their websites. 'Kid-friendly', 'relaxing atmosphere', 'vibrant nightlife', and 'good value for money' are examples of phrases that might be utilized to match supply with demand by understanding market demographics and psychographics.

To meet an increasingly sophisticated and segmented demand for resort products, some resort companies have paid close attention to demographic, psychographic and behavioral demand and have broadened their appeal to a wider market. Club Med, traditionally known for its active, singles lifestyle-oriented resorts, has now broadened its appeal and advertises family resorts, couples resorts, singles resorts, spa resorts, ski resorts, golf resorts, diving resorts, and tennis resorts. Other resort companies have narrowed their markets by specializing in a single niche, including the Sandals, which caters to 'couples in love' at its locations in St Lucia, the Bahamas, Jamaica, and Antigua.

SUMMARY AND CONCLUSION

This chapter has highlighted several aspects of the demand for tourism and lodging. It did not focus on the supply side, for this is the purpose of the rest of the book. It is clear that worldwide demand for tourism is tremendous. Lodging is perhaps the biggest beneficiary of the worldwide growth in arrivals, as the hundreds of millions (and billions in domestic terms) of overnight travelers require a place to stay. There are many things accommodation companies can do to understand various aspects of demand, including their market segments. This will help them target the correct population cohorts based on their demographic, psychographic, and behavioral characteristics. Geographic segmentation is also critical, as home location will often determine seasonal demand for hot- or cold-weather destinations.

There are many variables at play to determine the level of demand for destinations and accommodation services. These are primarily of an economic, natural, demographic, and political nature. In today's complex

world, these demand shifters are becoming even more important in determining the success of resorts, hotels, and other lodging businesses.

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World Tourism Organization: www.world-tourism.org.

World Travel and Tourism Council: <http://www.wttc.org/>.