

Changes in Leisure Time: The Impact on Tourism

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**Changes in Leisure Time:
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SECTION 1

INTRODUCTION, CONCLUSIONS AND RECOMMENDATIONS

SECTION 1 INTRODUCTION, CONCLUSIONS AND RECOMMENDATIONS

1.1 BACKGROUND

Tourism is the world's largest industry and growing significantly. International tourism arrivals worldwide grew by 36% to 625 million, and international tourism receipts grew by 65% to US\$445 billion, from 1990 to 1998. Europe is the major generator of outbound international tourism, accounting for 54% of global expenditure in 1996. The Americas generated 22% of expenditure, Asia Pacific 21%, and Africa and the Middle East 3%. Domestic tourism accounts for many more trips than international tourism, but overall with a significantly lower expenditure per trip. Detailed tourism statistics are published by WTO.

Until quite recently it was widely assumed, particularly in and concerning the richer countries, that working hours were steadily reducing, the amount of leisure time increasing and that these trends would continue. Many people looked forward to a golden age of leisure. In 1996 the Affiliate Members Committee of WTO agreed that the major changes which have been impacting on the world economy in recent years have made the situation much more complex and that a study of current trends in leisure time and their implications for tourism should be undertaken.

Governments, industries and employees are facing the consequences of globalisation and liberalisation of the world economy and the resulting fierce competitive pressures. Attention has become focused on efforts to make industries more competitive, raise productivity and counter unemployment. As a result there is now less concern for better working conditions. Those working conditions which specifically affect leisure time - shorter working days, shorter working weeks, longer holidays with pay and reducing the age of retirement - have taken a back seat. At the same time demographic shifts are occurring and also changes in the structure of family life and in the pattern of employment. All these factors bear upon the level of holiday taking.

In addition, there is a general absence of leisure time policies at government level. Tourism is now promoted by governments more for its economic benefits than for the health, social benefits and improved quality of life, which in the past justified increasing holiday entitlements in many countries.

1.2 SCOPE AND OBJECTIVES

This study examines the prospects for leisure time in a sample of 18 important tourism generating countries, to establish what changes in the pattern of leisure time are taking place, how these are reshaping holiday taking, and how governments and the tourism industry should respond. The countries are listed below by region.

Americas: Brazil, Canada and USA.

Asia Pacific: Australia, China, Japan, Korean Republic, Malaysia and Singapore.

Europe, Africa and the Middle East: Austria, France, Germany, Italy, Netherlands, Sweden, Switzerland, UK and South Africa.

14 of these countries are currently leading generators of outbound tourism. To ensure a broadly based study, avoid over concentration on Europe and North America, and look to growth markets of the future, Australia, China, South Africa and Malaysia are also included. The 18 selected countries generated 73% of international tourism expenditure, and 61% of international tourism arrivals in 1996.

When comparing the country positions in terms of trips and expenditure, Japan's relatively low ranking in terms of number of trips and third placing in terms of expenditure highlights its high average international tourist spend. The opposite applies to Malaysia, ranked fourth in terms of trips and the lowest in terms of expenditure when compared to the other selected countries.

Leisure time is shaped by hours of work, public holidays, paid leave entitlements and retirement arrangements, all of which vary widely between countries. Each has its own national values and traditions in terms of the importance attached to leisure and the institutional arrangements that shape it.

This study focuses on leisure time in relation to holiday taking, but there are many competing claims for leisure time and discretionary income in the vicinity of the home. As discretionary leisure time increases it at first frees people to take more holiday away from home. However, as leisure time increases further the proportion taken away from home falls.

Some of the countries included in the study have long standing traditions of leisure time and holiday taking, often buttressed by law and collective agreements between employers and employees. In other countries leisure patterns depend more upon convention and customary provisions in employment contracts. In these countries changes in the general economic climate can affect leisure provision quite quickly. There is a third group of countries, often with strong traditions of public holidays, in which the idea of regular holidays of several days, perhaps used to travel abroad, is still quite new and less well established in the social and economic fabric.

This study examines leisure time trends in each of the countries and changes in the international economy, which are creating new pressures on leisure time.

1.3 METHOD OF APPROACH

The study has been carried out by desk research, correspondence and discussion with the key interests in each country, including the governments departments and agencies responsible for tourism and related matters, national travel industry bodies and representative bodies of employers and employees. We have consulted international organisations with an interest in leisure and tourism, including OECD, ILO, the European Commission and Eurostat. Offices of Horwath International in the relevant countries have also assisted with our research. The study has also benefited from a series of seminars and meetings, organised by WTO, at which preliminary conclusions were discussed and valuable input received.

The information gathered enabled us to identify the institutional arrangements which shape leisure time in each country, recent trends and the factors which are now influencing how leisure time will develop in the future and how consumer behaviour and tourism are likely to be affected. We have analysed this information and set out our