Y 4
C73/7
T64

1041

DOCUMENTS

JUL 11 1977

FARRELL LIBRARY
KANSAS STATE UNIVERSITY

GOVERNMENT
Storage

95TH CONGRESS
1st Session

COMMITTEE PRINT

NATIONAL TOURISM POLICY STUDY
ASCERTAINMENT PHASE
REPORT ON THE ASCERTAINED NEEDS OF THE STATE AND LOCAL GOVERNMENT AND PRIVATE SECTORS OF THE TOURISM AND TRAVEL INDUSTRY

PREPARED AT THE REQUEST OF

HON. WARREN G. MAGNUSON, *Chairman*

COMMITTEE ON

COMMERCE, SCIENCE, AND TRANSPORTATION

AND

HON. DANIEL K. INOUYE, *Chairman*

NATIONAL TOURISM POLICY STUDY

FOR THE USE OF THE

COMMITTEE ON COMMERCE, SCIENCE, AND TRANSPORTATION

AND

NATIONAL TOURISM POLICY STUDY

KSU LIBRARIES
A11900 954304

JUNE 1977

Printed for the use of the Committee on Commerce, Science, and Transportation, United States Senate

---

U.S. GOVERNMENT PRINTING OFFICE

89-959 WASHINGTON : 1977

AUTHENTICATED
U.S. GOVERNMENT
INFORMATION
GPO

COMMITTEE ON COMMERCE, SCIENCE, AND TRANSPORTATION

WARREN G. MAGNUSON, Washington, *Chairman*

HOWARD W. CANNON, Nevada
RUSSELL B. LONG, Louisiana
ERNEST F. HOLLINGS, South Carolina
DANIEL K. INOUYE, Hawaii
ADLAIE. STEVENSON, Illinois
WENDELL H. FORD, Kentucky
JOHN A. DURKIN, New Hampshire
EDWARD ZORINSKY, Nebraska
DONALD W. RIEGLE, JR., Michigan
JOHN MELCHER, Montana

JAMES B. PEARSON, Kansas
ROBERT P. GRIFFIN, Michigan
TED STEVENS, Alaska
BARRY GOLDWATER, Arizona
BOB PACKWOOD, Oregon
HARRISON H. SCHMITT, New Mexico
JOHN C. DANFORTH, Missouri

EDWARD A. MERLIS, *Staff Director*
THOMAS G. ALLISON, *Chief Counsel*
JAMES P. WALSH, *General Counsel*
JOHN D. HARDY, *Tourism Counsel*
MALCOLM M. B. STERRETT, *Minority Staff Director*
WARD H. WHITE, *Minority Staff Counsel*

NATIONAL TOURISM POLICY STUDY

DANIEL K. INOUYE, Hawaii, *Chairman*

WARREN G. MAGNUSON, Washington
JAMES B. PEARSON, Kansas

FROM THE COMMITTEE ON APPROPRIATIONS

JOHN L. McCLELLAN, Arkansas
MILTON R. YOUNG, North Dakota

FROM THE COMMITTEE ON AGRICULTURE, NUTRITION, AND FORESTRY

HERMAN E. TALMADGE, Georgia
ROBERT DOLE, Kansas

FROM THE COMMITTEE ON BANKING, HOUSING, AND URBAN AFFAIRS

WILLIAM PROXMIRE, Wisconsin
EDWARD W. BROOKE, Massachusetts

FROM THE COMMITTEE ON ENERGY AND NATURAL RESOURCES

HENRY M. JACKSON, Washington
CLIFFORD P. HANSEN, Wyoming

FROM THE COMMITTEE ON ENVIRONMENT AND PUBLIC WORKS

GARY W. HART, Colorado
ROBERT T. STAFFORD, Vermont

FROM THE COMMITTEE ON FOREIGN RELATIONS

JOHN SPARKMAN, Alabama
CLIFFORD P. CASE, New Jersey

FROM THE COMMITTEE ON GOVERNMENTAL AFFAIRS

LAWTON CHILES, Florida
CHARLES H. PERCY, Illinois

FROM THE COMMITTEE ON HUMAN RESOURCES

HARRISON A. WILLIAMS, New Jersey
JACOB K. JAVITS, New York

FROM THE COMMITTEE ON THE JUDICIARY

JAMES O. EASTLAND, Mississippi
STROM THURMOND, South Carolina

FROM THE SELECT COMMITTEE ON SMALL BUSINESS

GAYLORD NELSON, Wisconsin
LOWELL P. WEICKER JR., Connecticut

LETTER OF TRANSMITTAL

U.S. SENATE,
COMMITTEE ON COMMERCE, SCIENCE, AND TRANSPORTATION,
June 6, 1977.

DEAR COLLEAGUE: The latest International Economic Report of the President stated that tourism in the United States is a $100 billion a year business which supports over 4 million jobs. Tourism is clearly among the most important industries in the United States, and in the great majority of our 50 States. Aside from its economic importance, tourism contributes to the social and cultural welfare of American citizens.

Within the Federal Government there are a multitude of programs and policies which impact travel and tourism. Unfortunately, they are fragmented, diffused, and often conflicting. Moreover, little has been done to develop and refine the Federal role in helping both the public and private sectors to insure tourism will contribute to the welfare of our country. Consequently, the Government has not been effective in responding to the tourism needs and opportunities of the industry or the public.

In an attempt to correct these problems and maximize the beneficial aspects of tourism while minimizing the costs and conflicts, the Senate undertook a study of the Federal role in tourism. S. Res. 347, cosponsored by 71 Senators and unanimously agreed to by the Senate on June 24, 1974, authorized the then Senate Commerce Committee to conduct a National Tourism Policy Study.

In October 1976, we presented the Study's first interim report which outlined the conceptual basis for the Policy Study, gave an overview of legislation which affects tourism, tentatively identified the national interests in tourism, and listed some of the problems associated with the present Federal role in tourism.

We are particularly pleased to present this second interim report which represents the progress of the Study through the second phase.

Based on work done by the committee and Arthur D. Little, Inc., it represents extensive input from the public and private sectors of the travel and tourism industry. It details the issues and problems confronting the industry in general, and their more specific relationships to Federal agencies and programs. Not only is the content vast and varied, it is sometimes conflicting. As such, the findings presented in this report do not necessarily reflect the official position of the U.S. Senate Committee on Commerce, Science and Transportation or the National Tourism Policy Study. Rather they represent the kinds of problems and issues which must be addressed in formulating a national tourism policy that will assist State and local governments and private industry in meeting the travel and tourism needs of the public. Thus far, the hallmark of the study has been the open and

frank input of the private and public sectors of the tourism industry and the public. While it is clear that the Federal Government has a significant role to play in tourism, it must be developed in full partnership with other public and private entities.

We have directed that this report be printed for the members of the National Tourism Policy Study and the Senate. We believe it will be of considerable assistance to the Policy Study as it proceeds to develop legislation and other recommendations to make the Federal role in tourism more effective and responsive to the national interest in tourism, and the needs of the public and private sectors of the industry.

We wish to emphasize that this report has not been approved, disapproved, or considered by the Committee on Commerce, Science, and Transportation or the National Tourism Policy Study.

WARREN G. MAGNUSON,
Chairman, Committee on Commerce, Science, and Transportation.
DANIEL K. INOUYE,
Chairman, National Tourism Policy Study.

CONTENTS

	Page
Introduction	1
The issues confronting the tourism and travel industry	7
Broad programmatic needs at the Federal level	21
Programmatic needs by issue	37
Programmatic recommendations by Federal agencies	67
U.S. Travel Service	68
U.S. Information Agency	71
Bureau of Security and Consular Affairs, Immigration and Naturalization Service/Bureau of Customs	72
Bureau of the Census	73
Federal Energy Administration	73
Bureau of Outdoor Recreation	74
National Park Service	75
U.S. Forest Service	75
Bureau of Land Management	76
U.S. Army Corps of Engineers	76
Small Business Administration	77
Economic Development Administration	77
Department of Housing and Urban Development	78
Environmental Protection Agency	78
Occupational Safety and Health Administration	78
Federal Highway Administration	79
Civil Aeronautics Board	79
National Railroad Passenger Corporation (Amtrak)	80
Internal Revenue Service	81
Office of Facilitation of the Department of Transportation	81
Urban Mass Transportation Administration	81
Bureau of Indian Affairs	82
Bureau of Reclamation	82
Federal Maritime Administration	82
Federal Trade Commission	82
U.S. Post Office	82
Department of Commerce	83
Department of Health, Education, and Welfare	83
Department of Labor	83
Summary results of the followup survey to the regional and national meetings	85

APPENDICES

A. Lists of needs and recommendations by regional and national meetings	111
B. Lists of participants at the regional and national meetings	155
C. Results of the National Tourism Policy Study followup questionnaire	164

CHAPTER I.—INTRODUCTION

Purpose and Organization of the Study

The following study represents a report by Arthur D. Little, Inc., (ADL), on the principal findings of the second phase of the National Tourism Policy Study (NTPS) currently being undertaken by the U.S Senate Committee on Commerce, Science, and Transportation. This second study phase was designed to ascertain the present and future tourism needs of the State and local governments and major segments of the private sector of the tourism and travel industry. Arthur D. Little, Inc., was engaged by the Senate Commerce Committee, Science, and Transportation, to assist the committee in carrying out this ascertainment phase of the study.[1]

The principal vehicle for ascertaining the tourism needs of the State and local public sectors and the private sector was a series of regional and national meetings. These meetings provided an opportunity for representatives of State and local governments and the private sector to discuss the principal issues confronting the tourism industry, to articulate their tourism needs, and to voice their recommendations concerning ways in which the current Federal involvement in tourism and travel can be made more effective and responsive to these needs.

Past studies by government agencies and commissions which examined the tourism resources and needs of the United States have been criticized for failing to consider the views and recommendations of those individuals and organizations in the public and private sectors which have the day-to-day responsibilities for tourism research, planning, development and promotion. This study is designed to insure full consideration of such views and recommendations.

The findings of the report are based on the views and recommendations expressed by participants at the six regional meetings and seven national meetings of the NTPS. At each meeting, Arthur D. Little recorded participants' views on the important needs of the industry and participants' recommendations for more effective programmatic involvement on the part of the Federal Government. During the sessions, participants undertook a preliminary ranking of importance for the needs and recommendations which had been developed in their session. Some suggested needs received widespread acknowledgement and support at a number of meetings; others were less frequently mentioned and emphasized.

At this stage of the NTPS, however, the principal goal has been simply to record programmatic needs and recommendations and indicate the broad range of issues confronting the tourism industry and possible alternative courses of action for alleviating or eliminating those issues. For many of the suggested needs and programmatic changes, there are inherent conflicts and trade-offs with other needs and other policy and program objectives. These trade-offs must be

---

[1] The Committee gratefully acknowledges the participation and invaluable assistance of Dr. John D. Hunt, Assistant Dean, College of Natural Resources, Utah State University.

clarified and carefully assessed, both in the further stages of the national tourism policy study and by Government policymakers and the private sector on an ongoing basis.

A follow-up questionnaire was sent to meeting participants by Arthur D. Little, Inc., as a first step in clarifying some of these trade-offs and developing a statistically more reliable measure of participants' views on the importance of various needs. A summary of the results of the questionnaire are presented in chapter VI. In the final report of the NTPS to be completed by December 1977, the survey responses as well as the results of the regional and national meetings will be integrated into the overall findings of the NTPS. At this stage, the goals have been to lay a broad base from which to proceed with the final stages of the study and to insure that no meritorious suggestions or ideas are excluded from consideration.

The remainder of this report is organized into five chapters dealing with:

The issues confronting the tourism and travel industry;

Broad programmatic needs at the Federal level identified by participants at the regional and national meetings;

Specific recommendations for programmatic change organized by major issue;

Specific recommendations for programmatic change organized by Federal agency; and

Summary of the results of the NTPS questionnaire survey.

Background of the National Tourism Policy Study

Senate Resolution 347, cosponsored by 71 Senators and unanimously agreed to by the Senate, on June 24, 1974, authorized by the then Senate Commerce Committee to undertake a national tourism policy study. As envisioned by the study, a national tourism policy should be a prescription for assuring that the Federal tourism effort effectively respond to the national interests in tourism and, where appropriate, meet the needs of State and local governments and the private sector of the industry (including labor and consumer interests).

In order to meet this objective, such a policy must embody specific directions (and prescribe the necessary mechanism(s) and/or technique(s) for executing these directions) on how existing Federal agencies administering policies and programs significantly affecting tourism can do the following:

Evaluate the degree to which their activities support the national interests in tourism, fulfill their statutory mandates relating to tourism, and meet the tourism needs of State and local governments and the private sector;

Coordinate their separate efforts where they have common or related objectives pertaining to tourism research, planning, development, or promotion;

Eliminate (where possible) those aspects of their policies or programs which contradict or are counterproductive of the Federal toursim effort; and

Receive continual input and recommendations from State and local governments and the private sector with respect to tourism needs, and State and local evaluation of the individual Federal policies or programs which are intended to meet those needs.

The first phase of the national tourism policy study, completed in August 1976, was designed to tentatively identify the national interests in tourism and to designate the current Federal programs and policies which significantly impact on tourism. This was followed by the second or ascertainment phase of the study.

In the final study phase of the NTPS, the information put forward in the first and second phases will be analyzed, and a selected number of key Federal policies and programs will be assessed from the standpoints of (a) the specific statutory mandate for each program; (b) the national interests in tourism which the program meets, and (c) the ascertained needs of the public and private sectors of the tourism industry.

Based on this assessment and the results of the previous study phases, the final product of the NTPS will be recommendations for a national tourism policy, and an appropriate role for the Federal Government in carrying out this policy both to satisfy the national interests in tourism and to meet the needs of the public and private sectors of the industry. Also included will be recommendations for legislative, organizational, and programmatic changes necessary to implement the suggested national tourism policy, as well as recommendations for any additional Federal policies or programs deemed necessary. The National Tourism Policy Study is scheduled for completion by December 1977.

STUDY METHODOLOGY FOR THE ASCERTAINMENT PHASE OF THE NTPS

The ascertainment phase of the NTPS was organized around a series of regional and national meetings sponsored by the U.S. Senate Committee on Commerce, Science, and Transportation, designed to bring together experienced and knowledgeable tourism representatives from the private sector and from the public sector at the State and local levels.

The overall objectives of the regional and national meetings were threefold:

Elucidate the tourism research, planning, development, and promotional needs of States, regional commissions, cities, and private sector associations and entities;

Assess the operational effectiveness of current Federal programs and policies in meeting those needs; and

Develop specific recommendations for program improvements which would result in Federal policies and programs being more responsive to public and private sector needs.

Six day-long regional meetings were held during late November and December of 1976 in various cities throughout the United States: Boston, Washington, D.C., Atlanta, Chicago, Denver, and San Francisco. Each of these regional meetings brought together from 20 to 35 designated expert representatives from State Governors'

offices; State tourism agencies; mayors' offices, city tourism, convention or visitors' bureaus; regional development commissions; and private industry, and labor associations.

Invitations to participate were extended to the 50 States; all U.S. territories; all Federal/State regional commissions; the 26 U.S. cities with 500,000 or greater population; 12 cities with populations between 100,000 and 500,000 (2 from each of the 6 designated regions); all U.S. cities identified by Rand McNally as the "most visited" in 1975. Governors, mayors, and the chairperson of each regional commission were asked to designate appropriate representatives. In all, 43 States and 42 cities were represented by a total of 160 participants at the 6 regional meetings.

The regional meetings were organized as a series of progressive working sessions guided by ADL moderators. Participants were divided into teams of 8 to 15 individuals each working through various levels of intensive discussions. The primary purpose of the working sessions was to identify the needs of the tourism industry and specific improvements needed in existing Federal programs that significantly impact on tourism. Agendas for the meetings were designed to stimulate full exploration of the issues and lively interchange of ideas among participants. During the working sessions, individual teams ranked the tourism needs which they had identified.

Following the regional meetings, ADL sent each participant a summary of the needs identified by that participant's team (see appendix A), a ranking of those needs (as determined by the team that identified those needs), and a list of team participants. A detailed followup questionnaire was also sent soliciting further information on Federal programs that impact on tourism as well as greater information on needs repeatedly mentioned during the regional and national meetings. The results of the questionnaire submitted by participants are contained in appendix C.

ADL organized seven national meetings in Washington, D.C., in early January 1977. These national meetings were intended to serve as a forum for the representatives of private sector groups and organizations to express their views and opinions concerning the critical needs of various segments of the private sector of the tourism and travel industry.

For purposes of meeting design, representative organizations and associations were grouped as follows.

(1) surface transportation executives;
(2) air transportation executives;
(3) public interest group representatives;
(4) lodging executives;
(5) labor representatives;
(6) travel promotion executives; and
(7) attractions and recreational activities representatives.

ADL's intent in the national meetings was to get substantive inputs from a diverse and representative group of industry leaders, but not necessarily from a sample large enough to make national projections. In the interests of generating thoughtful inputs and discussion, it was necessary to maintain the number of participants at a manageable number. Eventually, representatives from 143 separate organizations and associations were invited to participate in the national meetings.

The national meetings were organized as working sessions guided by Dr. Cyril C. Herrmann, vice president of ADL, and Mr. John D. Hardy, Tourism Counsel for the Senate Committee on Commerce, Science, and Transportation. During the course of the 2-hour meetings, participants identified the pressing needs of the tourism industry and specific improvements required in existing Federal programs associated with tourism. The tourism needs identified by each group were ranked by participants.

Following the national meetings, ADL sent participants a summary of the needs identified by their group and a list of meeting participants. A detailed followup questionnaire was also sent. Detailed responses from national meeting participants are also contained in appendix C.

CHAPTER II.—THE ISSUES CONFRONTING THE TOURISM AND TRAVEL INDUSTRY

Both the public and private sectors of the tourism and travel industry are currently confronting a number of difficult issues and problems. Some of these issues are applicable to the industry as a whole; some are specific only to a particular industry segment or regional area; while still others extend well beyond the tourism and travel industry in their application and relevance.

Some of these issues are basic and inherent in the very nature of tourism and travel—and consequently only slightly or partially amenable to full solution. Others, a product more of current conditions in the industry, are likely to prove somewhat less enduring and more responsive to resourceful and well-planned public and private sector action aimed at alleviating these problems.

The Regional and National Meetings of the National Tourism Policy Study served as a forum at which key State and local public sector officials and private sector representatives were able to identify and discuss these issues as well as suggest possible means for bringing about solutions. While the emphasis at the meetings was on exploring ways in which the Federal Government could be made more responsive to the needs (and, by implication, the issues) of the tourism and travel industry, discussion was not limited solely to problems associated with the current Federal involvement in tourism and travel. On the contrary, much of the meeting discussions were centered around the basic issues of the industry—the rationale being that it is impossible to devise an appropriate national tourism policy for the Federal Government without understanding the specific issues confronting the tourism and travel industry. It is critical to understand the ways in which these issues are interrelated. It is also important to know the degree to which these issues are endemic to the tourism and travel field or are susceptible to concerted action on the part of the public and private sectors—action aimed at improving the conditions and rewards of tourism and travel for all involved—government, the private sector, and the general public.

DIFFERENTIATING BETWEEN UNDERLYING NEEDS AND ISSUES AND PROGRAMMATIC NEEDS

At the outset, it is important to distinguish between underlying needs and issues and programmatic needs. While the second phase of the National Tourism Policy Study was designed to ascertain the "needs" of the tourism and trave industry, there are, in fact, at least two different kinds of needs in the industry.

While the basic or underlying issues or problems discussed during the regional and national meetings of the NTPS have frequently been exacerbated by too little or too much Federal involvement in the tourism and travel field, in most cases the issues are not the direct

result of Federal policies or programs, but rather are reflective of deep-seated or underlying needs of the industry which are not being met. In effect, an issue arises when one or more of these underlying needs cannot be satisfied due to conditions in the industry.

Beyond these underlying needs and issues, however, participants in the regional and national meetings also discussed a second group of tourism needs which are directly associated with Federal policies and programs in the tourism field (and, to a lesser extent, with State and local policies and programs as well). These programmatic needs represent needs for improvement and change in public sector policies and programs to enable public sector activities to more effectively satisfy tourism and travel's underlying needs. In effect, programmatic needs identified by participants represent recommendations by participants as to how the Federal Government (as well as State and local governments and the private sector itself) can better work to solve the industry's pressing problems.

The programmatic needs associated with the Federal Government's involvement in tourism and travel will be identified and discussed more fully in chapters III, IV, and V. In this chapter, we will discuss the underlying needs and issues identified at the regional and national meetings of the NTPS. While many of these underlying needs may seem obvious, it is important to identify them insomuch as they form the background rationale for most of the recommendations for programmatic change in the Federal Government's tourism policies and programs.

UNDERLYING ISSUES OF TOURISM AND TRAVEL AND THE NEEDS ASSOCIATED WITH THOSE ISSUES

The underlying tourism issues and needs identified during the ascertainment phase of the NTPS can be placed into three broad categories: (1) the underlying issues and needs of the consuming public; (2) the underlying issues and needs of the private sector of the tourism and travel industry; and (3) the underlying issues and goals of the public sector.

The public sector at the State and local levels does not have underlying "needs" in the same sense that the consuming public and the private sector do; however, State and local governments in the United States have generally adopted numerous goals associated with satisfying the needs of the public and the private sector. It can be said, therefore, that the public sector at the State and local level has underlying goals and associated issues intimately related to the underlying needs and issues of the consuming public and the private sector.

Underlying needs and issues for the consuming public

The underlying needs of the consuming public are reflective of the public's demand for tourism and travel resources and opportunities and include:

An expanding and increasingly sophisticated supply of varied tourism and travel resources, opportunities, facilities, and services;

Measures to facilitate potential foreign visitors to take advantage of opportunities for travel to the United States; and

Measures to facilitate travel and tourism among the large segment of the general public which has never taken advantage of opportunities for travel and tourism in the United States.

Whereas the first need of the consuming public relates to actual demand for tourism resources, services, and facilities in terms of quantity, quality, and variety demanded; the latter two needs are related to the latent demand of some domestic and foreign segments of the public which are inhibited from availing themselves of tourism opportunities in the United States.

Broad issues for the tourism and travel industry arise out of the fact that none of these basic needs are being satisfactorily met. More specifically, State and local tourism officials and private sector representatives are confronted by:

Difficulties in satisfying the public's expanding and increasingly sophisticated demand for tourism and travel resources, opportunities, facilities, and services;

The failure of larger numbers of potential foreign visitors to take advantage of opportunities for travel to the United States; and

The failure of a large segment of the general public to take advantage of opportunities for travel and tourism within the United States.

Participants identified a number of reasons behind the difficulty in satisfying the public's expanding and increasingly sophisticated tourism demand. The first was inadequate development of tourism attractions, services, and facilities, including:

Inadequate tourism services and facilities designed to meet specific regional and local needs of the public;

Inadequate tourism and recreational services and facilities for urban populations;

Inadequate recreational attractions, accommodations, and other services and facilities on public parklands and recreational lands; and

Inadequate historical and cultural facilities for the touring and traveling public.

Inadequate development of tourism resources and opportunities is a major source of difficulty in supplying the level and variety of services and facilities demanded, but the inadequate or potentially inadequate quality of services and facilities was also seen by participants as a major source of difficulty in meeting the increasingly complex and discriminating needs of the public.

Inadequate development of surface and air transportation facilities was a third major source of concern. In particular, participants considered to be major problems the inadequate development of public mass transportation facilities and a lack of sufficient transportation access to public park and recreational lands in rural areas. Participants cited problems with both the extent of domestic transportation networks and the lack of intermodal linkages among the various

networks. They argued, in addition, that the quality of transportation services—particularly surface transportation services—frequently led to difficulties in satisfying the public.

The concentration of public demand on certain popular tourism regions, sites, and attractions was considered a fourth difficulty in meeting the public's tourism demands. Such public concentration has increasingly led to overcrowding, degradation of tourism facilities and the surrounding environment, and a consequent reduction in the quality of the individual tourism experience.

Such overconcentration is partly a product of inadequate development of alternative less-used tourism sites and areas, but also is due to inadequate provision of information about alternative opportunities. This is an example of the larger issue of insufficient informational activities to acquaint the public with the broad range of travel and tourism opportunities and services available. As a result, public demand often goes unsatisfied in spite of the availability of tourism resources.

Participants also felt that inadequate research and planning contribute to difficulties in meeting public demand. Available research data is frequently insufficient to permit planning and development of tourism resources which appropriately meet the variety of needs of different tourists and travelers, particularly on a regional or State level. Proper regional or State tourism development planning is often overlooked with similar results.

Finally, a lack of adequate consumer protection was cited as contributing to the difficulty in satisfying consumer demands. The most frequently mentioned consumer protection problems were those associated with wholesalers and retailers of tour packages and transportation services.

The failure to attract greater numbers of foreign visitors was ascribed by participants principally to inadequate development of facilities and services for foreign visitors and inadequate and ineffective promotion abroad of travel opportunities in the United States.

The failure of a large segment of the U.S. population to travel was seen primarily as a problem of inadequate and ineffective educational promotion of the means for taking advantage of the wide range of available travel and tourism opportunities, and inadequate research into the kinds of psychological obstacles which prevent the nontraveling public from availing themselves of those means.

In addition, participants cited a lack of adequate development of tourism opportunities and services for those who are confronted by physical or economic barriers to travel and tourism, including the economically disadvantaged, minorities, the aged, and the physically handicapped.

At first glance, it might appear to be desirable that larger numbers of potential foreign visitors have not taken advantage of opportunities for travel to the United States—given expanding tourism demands of the domestic public and the apparent difficulties with overcrowding at some sites. The same might appear true for the fact that a significant proportion of the U.S. public infrequently or never travels far from home.[1]

---

[1] The 1972 National Travel Survey reported that 45 percent of the U.S. population in 1972 failed to take a trip of at least 100 miles. Department of Commerce, Bureau of the Census, "National Travel Survey," 1972, p. XV.

In fact, however, the inadequacy in the supply of tourism resources or opportunities appears frequently to be a problem of the wrong kind of development in the wrong place, rather than an overall lack of supply. Moreover, most participants agreed that if the tourism industry appears to be confronting difficulties in providing adequate supplies of tourism resources to the public, the preferable solution lies in devising means to expand the supply rather than measures to contract the demand.

Finally, satisfying the latent demands of potential foreign tourists to the United States as well as those of the large nontraveling segment of the U.S. population will provide important social and economic benefits to travelers from those groups, to the general public and to the tourism industry itself.

Underlying issues and needs for the private sector

The principal underlying need of the private sector of the tourism and travel industry is for adequate profitability to insure the capability of meeting the present demands of the consuming public while generating sufficient capital investment for future growth of the industry.

The principal broad issue for the private sector identified during the regional and national meetings was related to the difficulties which the private sector has been experiencing in recent years in achieving adequate profitability to meet both present consumer demands and to insure adequate expansion in the future.

Inadequate profitability has been a major factor behind inadequate development of tourism resources and opportunities, as well as behind instances of decline in the quality of available services. The reasons for inadequate profitability in the industry thus directly contribute to the difficulties encountered in satisfying the tourism demands of the consuming public.

Participants at the regional and national meetings identified 13 major reasons for the difficulties currently confronting the private sector of the tourism industry.

The fragmented nature of the industry in a period of growing interdependence among different segments of the industry has frequently resulted in uncoordinated planning, development, and promotion, with a consequent negative impact on profitability. Elaborate and highly efficient communication systems, the increased mobility of the average tourist or traveler, and the increasingly discriminating demands of the consumer have all created greater interdependence among various segments of the industry, and among elements of the industry in different regions of the country.

Yet, with some notable exceptions, representatives of the private sector of the tourism and travel industry have had difficulty in the past in viewing the industry as an "interdependent process" in which effective coordination of many activities could yield benefits to the industry as a whole. A consequence of his lack of coordination has been frequent destructive competition among industry elements, particularly within a given segment of the industry, such as lodging or transportation. While participants at the regional and national meetings expressed a healthy respect for the forces of free-market competition, many felt that too frequently in the past elements of the industry had engaged in isolated development or promotional activities which resulted in destructive competition for the same

tourism revenues, rather than expansion of the total tourism market through mutually supportive action.

A second consequence of industry fragmentation has been a general difficulty in joining efforts effectively to convince public sector officials of the economic and social significance of the industry. This lack of political influence for the industry as a whole has resulted in a loss of many possibilities for public sector financial and technical support, with the attendant negative impacts on profitability in the industry.

The declining availability and rising costs of capital have combined in recent years with escalating development and operating costs to decrease the profitability of many tourism and travel enterprises and increase the obstacles to adequate investment for the future. This situation has been particularly acute in the domestic airline industry, among surface transportation carriers, and in the lodging and attractions segment of the tourism industry. Moreover, there appears to be little likelihood of any immediate or long term relief for this situation.

Seasonality trends in the tourism industry have always had particularly negative effects on the profitability of private tourism businesses and the ability of the tourism industry to serve as a generator of full-time employment. With the rapid growth in the public's demand for a variety of tourism services and facilities, the tourism industry has begun to respond with more imaginative and innovative development to overcome some of the inherent problems posed by seasonality cycles in the industry. Much more could be done, however, and—particularly for small tourism businesses and those operations tied closely to narrow seasonal markets—seasonality remains a severe threat to profitable operations.

The rising costs and potential declining availability of energy in general and petroleum in particular pose, perhaps, the most severe immediate and long term threats to the viability and economic health of the tourism and travel industry. In recent years, the industry has accounted for roughly 10 percent of U.S. petroleum consumption, a relatively large amount in relation to the total size of the industry.[2] Federal emergency energy allocation measures adopted in the wake of the 1973 Arab oil embargo had abrupt and devastating economic impacts on important segments of the tourism industry, particularly those segments which depended heavily on weekend tourism and assured access to their facilities by private automobile. While the industry has begun to undertake measures on its own to reduce its vulnerability somewhat to future increases in energy costs or a sudden stoppage of energy supplies, the critical national scope of the problem and its relative intractability mean that the issue will be a continuing one and that the actions and policies of the Federal Government will continue to play a critical role in determining the degree to which the tourism industry can successfully adapt to new energy conditions.

Popular opposition to further tourism development has had a constraining effect in some areas on development of adequate tourism facilities and services to meet the needs of both extra-regional travelers and the needs of regional and local populations. Usually, the argument has taken the form that out-of-State and extra-regional travelers come into a region or local area, consume local resources—thereby reducing their availability to local citizens—degradate the general environment,

[2] U.S. Travel Data Center, "Importance of Tourism," 1975, pp. 9–10

and leave again having contributed little of value. Much of the opposition has been engendered by poorly planned development or overdevelopment of tourism sites and resources, with consequent highly visible problems of overcrowding, overcommercialization, environmental degradation, loss of local community characteristics, and decline in local quality of life. In addition, local or regional communities have frequently been not well informed concerning—less-visible—benefits accruing to local and regional populations in the form of jobs, incomes, public revenues, and recreational opportunities. While the problem has appeared to have grown more widespread in recent years, it is one which is relatively amenable to concerted action on the part of the public and private sectors.

The explosive growth of the tourism industry during the past decade in the face of a relatively finite supply of natural resources and available land has, in combination with an intensification of general industrial pollution, led to the emergence of increasing constraints on tourism development due to efforts to protect the quality of the environment. In many ways, protection of environmental quality is an essential requirement for the long term health of the tourism and travel industry, since a good portion of the industry depends for its existence either directly or indirectly on the attractions of the natural environment. Moreover, there is no a priori reason why carefully planned development in the tourism industry cannot enhance rather than degrade the environment. In fact, for regions or areas which need greater economic development and its attendant employment and income benefits, tourism development can frequently be more environmentally sound and have less negative impacts on the environment than other, more heavily polluting manufacturing industries.

However, in the short term, satisfaction of environmental needs often does pose costly problems for the economic health of individual enterprises in the tourism industry. Moreover, many proponents of tourism development feel that environmental advocates have combined with the Federal Government to support environmental protection measures which endorse environmental criteria in excess of that required to protect the natural quality of the environment and the health of the Nation's population. Some participants at the regional and national meetings cited the "significant deterioration" or "non-degradation" criteria for ambient air quality in nonindustrialized areas as an example of excessive Federal regulations which were likely to significantly choke off tourism development in many areas of the Nation.

Even where tourism development is undertaken in a manner which enhances the quality of the environment, such development is often more costly than development undertaken in disregard of environmental consequences. In combination with other factors which have raised development costs while lowering industry profitability, competition between environmental needs and tourism development needs is an important issue for the tourism industry.

Competition between public and private sector development of tourism facilities and services on public recreational lands or in areas adjacent to public recreational lands was another important issue cited by participants. Many publicly owned tourism attractions, facilities,

and services operated by Federal public land agencies or leased by franchise to public concerns operate with considerable competitive advantage over similar privately owned facilities and attractions. Publicly owned attractions may be partically or wholly subsidized by public tax revenues, while privately owned facilities must depend entirely on user-charges to finance development and operation. Public attractions and facilities enjoy implicit tax benefits and are often subject to less rigorous regulatory standards for development and ongoing operation.

Furthermore publicly owned facilities often compete for the same tourism revenues as do nearby privately owned facilities with the result that the latter end up losing potential market shares. While this can be fatal to private concerns, attractions and facilities managed by the public sector can often afford to lose revenues because of the element of subsidy involved in their maintenance.

Instances of competition between public and private sector development activities, however, should not be allowed to obscure the fact that frequently public sector investment in parklands and other natural resource attractions creates opportunities for private sector investment in tourism facilities and services which would otherwise not exist. This symbiotic relationship between public and private sector investment can often be enhanced through careful planning to avoid some of the undesirable competitive aspects of public and private sector investment in the same areas.

A related, but more general issue has to do with the difficulties of survival for the thousands of small businesses in the tourism and travel industry. While in recent years there has been an increasing trend toward larger enterprises and greater industry concentration in particular segments of the tourism industry such as lodging, the tourism industry remains to a considerable extent an industry of small enterprises.

All of the financial and management problems inherent in the tourism and travel industry are magnified for small businesses: High costs of development and difficulties in obtaining capital; seasonality fluctuations; impermanence of the labor force; the negative impacts of rising energy costs and potential energy shortages; environmental constraints on development; and competition from the public sector.

In addition, however, small businesses have had to contend with increasing Federal regulation of their activities, while often being inadequately equipped in terms of know-how or financial resources to deal with the added constraints imposed by the need to meet myriad Federal regulatory requirements. Small tourism businesses frequently suffer not only from a lack of managerial, planning, and marketing expertise; they also often lack sufficient financial resources to weather severe negative impacts arising from such developments as energy crises or cyclical downturns in the economy. While some of the problems faced by small businesses are probably incapable of being fully eliminated, a number of them have, in the past, proved responsive to aid from lodging franchises, trade associations, and the public sector and will continue so in the future.

Other issues for the private sector include inadequate research, planning, and promotion for the tourism industry by both the public and private sectors. Research activities have been inadequate to

support effective planning for both site-specific and regional tourism development. It has been impossible for public and private sector planners at the State and local level to carry out truly effective planning without a complete and comprehensive data base on marketing factors such as travel flow patterns, travelers' motivations and needs, and personal expenditure data; and economic impact factors such as overall expenditures and resulting levels of employment, income, and public revenues generated. Even where adequate research data exists, however, the industry in general lacks the necessary "planning mentality" to put such data to use in planning on a widespread basis. The inadequacy of planning efforts has intensified obstacles to profitable and efficient capital investment in the tourism industry. As these obstacles have proliferated in recent years, the need for effective planning has grown more critical.

Inadequate promotional activities—both domestic and international and both general and site specific—have also made it more difficult for tourism enterprises to operate successfully by denying many firms access to potential consumers among the general public simply because of a lack of consumer knowledge concerning the availability of services and facilities offered by the private sector.

Outside of very large corporations, individual firms in the private sector of the tourism industry can rarely afford to underwrite promotional campaigns large enough to effectively tap their potential markets and must rely heavily on public sector promotional activities. Such public sector promotional activities are generally more cost effective because of their capability for marketing whole localities or regions as attractive tourism destinations, with consequent benefits for tourism operations throughout the region or locality.

Inadequate numbers of skilled, professional personnel in the tourism and travel industry have also caused difficulties for profitable operation. In spite of a prevalence of job opportunities in the industry for low-skilled or untrained workers, the tourism industry in the past has suffered from an inability to attract large numbers of talented individuals into permanent careers in the industry. A general lack of prestige for the industry (outside of the major corporations) and an inadequate number of professional training programs at colleges, universities, and vocational schools around the country have contributed to this problem.

Underlying issues and goals for the public sector at the State and local levels

Underlying goals of the public sector identified at the regional and national meetings of the NTPS include:

Satisfaction of the tourism and recreational needs of regional and local populations;

Stimulation of urban economic rejuvenation and additional sources of public revenues;

The stimulation of regional and local economic development and attendant additional public revenues;

Alleviation of unemployment, particularly on a regional and local basis and among less-skilled workers, youths, and minorities;

Maintenance of the quality of life and the quality of the environment for regional and local citizens.

The broad issues associated with these basic goals of the public sector at the State and local levels include:

Difficulties in satisfying the demands of regional and local populations for tourism opportunities, facilities, and services;

Difficulties in stimulating sufficient economic development and in finding additional sources of public revenue;

Continuing high unemployment;

Trends toward a diminishment of the quality of life or a decline in the quality of the environment for regional and local populations.

It follows from the nature of these broad underlying issues and goals that the public sector finds itself concerned, in one way or another and at one time or another, with all of the specific problems and issues in the tourism and travel field confronting the consuming public and the private sector.

In addition to those mentioned above, however, the public sector at the State and local level also faces some unique issues associated with a lack of adequate programmatic tools, techniques, or funding to meet its various goals (goals which are, in turn, oriented around meeting the needs of the consuming public and the private sector).

Thus, for example, the public sector has been faced with the problem of inadequate promotion of job opportunities in the tourism and travel industry for entry-level workers, less-skilled workers, and the unemployed. The employment generating potential of the tourism industry has frequently not been fully appreciated, and the potential capabilities of the tourism industry for alleviating the often chronic unemployment problems of specific regions and localities in the United States have often not been fully utilized.

A corollary of this problem has been a lack of programs for training and educating skilled, semiskilled, and unskilled working personnel for jobs in the tourism and travel industry.

Research activity at the State and local level has been inadequate for the wide range of planning, market development and program evaluation activities which are needed at the State and local level if State and local governments are to meet their tourism-related goals.

State and local government planning for multicounty and statewide tourism development has been inadequate to meet the tourism needs of the consuming public, maximize profitability, and integrate tourism with other social, industrial, and environmental needs.

Finally, State and local governments have lacked sophisticated formulas and mechanisms for allocating and distributing financial and technical assistance to intrastate regions and localities in ways which would maximize the beneficial impacts of such funding or technical assistance. Frequently, financial and technical resources have been distributed on the basis of immediate political demands rather than demonstrated long term need, with a resulting loss of overall benefits over the long term.

Table 1 summarizes the broad issues and related underlying needs identified during the ascertainment phase of the NTPS. Table 2

summarizes specific issues identified at the regional and national meetings which, in effect, represent specific reasons behind the broad issues or problems facing the tourism and travel industry. It should be stressed that this "list" of needs and issues is based on the output of the regional and national meetings; while it is representative of the views of those who took part in those meetings, it is not necessarily comprehensive, particularly with respect to specific problems or issues.

TABLE 1.—BROAD ISSUES AND UNDERLYING NEEDS ASSOCIATED WITH THE TOURISM AND TRAVEL INDUSTRY

Broad issues and underlying needs of the consuming public

Issue.—Difficulties in satisfying the public's expanding and increasingly sophisticated demand for tourism and travel resources, opportunities, facilities, and services.

Need.—An expanding and increasingly sophisticated supply of varied tourism and travel resources, opportunities, facilities, and services.

Issue.—The failure of larger numbers of potential foreign visitors to take advantage of opportunities for travel to the United States.

Need.—Measures to facilitate potential foreign visitors to take advantage of opportunities for travel to the United States.

Issue.—The failure of a large segment of the general public to take advantage of opportunities for travel and tourism within the United States.

Need.—Measures to facilitate travel and tourism among the large segment of the general public which has never taken advantage of opportunities for travel and tourism in the United States.

Broad issues and underlying needs of the private sector of the tourism and travel industry

Issue.—Difficulties in achieving adequate profitability to meet present consumer demands for services and facilities while generating sufficient capital for future industry expansion.

Need.—Adequate profitability to insure the capability of meeting the present demands of the consuming public while generating sufficient capital investment for future growth of the industry.

Broad issues and underlying goals of the State and local public sectors

Issue.—Difficulties in satisfying the demands of regional and local populations for tourism opportunities, facilities, and services.

Goal.—Satisfaction of the tourism and recreational needs of regional and local populations.

Issue.—Continued high unemployment on a national, regional, and local basis, particularly among less-skilled workers and minorities.

Goal.—Alleviation of unemployment and promotion of job opportunities in tourism and other industries.

Issue.—Difficulties in stimulating sufficient economic development and in finding additional sources of public revenue.

Goal.—Stimulation of urban economic rejuvenation, regional and local economic development, and development of public revenue sources.

Issue.—Continuing degradation of the environment.

Goal.—Maintenance of the quality of the environment.

TABLE 2.—SPECIFIC ISSUES ASSOCIATED WITH THE TOURISM AND TRAVEL INDUSTRY

Specific issues for the consuming public

Inadequate development of tourism attractions, opportunities, services, and facilities for meeting the needs of the consuming public, including:

Regional and local needs for services and facilities;

Urban needs for services and facilities;

Need for services and facilities on public lands;

Need for historical and cultural opportunities.

Inadequate or potentially inadequate quality of services in the tourism and travel field for meeting the increasingly sophisticated demands of the public.

Inadequate surface and air transportation facilities and services (both the extent of transportation networks and their linkages and the quality of transportation services), including:

Inadequate public mass transportation facilities;

Inadequate transportation access to public lands.

Concentration of public demand on certain popular tourism regions, sites, and attractions resulting in overcrowding and diminishment of the individual tourism experience.

Inadequate provision of information to consumers on the wide range of available travel and tourism opportunities, facilities, and services, and of the means for taking advantage of them.

Inadequate provision of information to potential foreign visitors of travel opportunities in the United States.

Inadequate understanding of the consuming public's specific tourism and travel needs, desires, and motivations due to inadequate research.

A failure to meet the public's tourism and travel needs and demands due to inadequate planning for tourism development.

Inadequate consumer protection for the touring or traveling public.

Inadequate development of facilities and services for foreign visitors to the United States.

Inadequate tourism opportunities and services for the economically disadvantaged, minorities, the aged, and the physically handicapped.

Specific issues for the private sector

Fragmented nature of the tourism and travel industry in a period of growing interdependence among segments of the industry.

Declining availability of capital and high development and operating costs in the tourism and travel industry, including:

The domestic airline industry;

The domestic surface transportation industry;

The lodging and attractions segments of the industry.

The negative effects of seasonality cycles on the tourism and travel industry.

Rising costs and declining availability of energy in general and gasoline in particular.

Popular opposition to further development of tourism facilities and services in some areas.

Conflict between the need for tourism development and the need to protect the environment.

Competition between public and private sector development on public lands or lands adjacent to public lands.

Difficulties of survival for small businesses in the tourism and travel industry.

Inadequate promotion of specific tourism attractions, sites, facilities, or services.

Inadequate promotion overseas of travel opportunities in the United States.

Inadequate planning for both site-specific and regional tourism development to maximize profitability for both the individual entrepreneur or firm and for the industry as a whole.

Inadequate promotion among foreign organizations of potential opportunities for holding international conventions, fairs, and meetings in the United States.

Inadequate numbers of skilled, professional personnel in the tourism and travel industry.

Specific issues for the State and local public sectors

All of the above; plus—

Inadequate promotion of job opportunities in the tourism and travel industry.

Inadequate training and education of skilled, semiskilled, and unskilled working personnel for the tourism and travel industry.

Inadequate planning for multicounty and statewide tourism development to maximize profitability, meet the tourism needs of the consuming public, and integrate tourism with other social, industrial, and environmental needs.

Inadequate research for planning, market development, program evaluation, and industrial trend evaluation.

Inadequate formulas and mechanisms for allocating and distributing financial and technical assistance in ways which will maximize the beneficial impacts of such assistance.

CHAPTER III.—BROAD PROGRAMMATIC NEEDS AT THE FEDERAL LEVEL

During the regional and national meetings of the National Tourism Policy Study, a number of broad needs for programmatic change at the Federal level were identified by participants. These broad needs are, for the most part, applicable to a large number of Federal agencies and programs associated with tourism research, planning, development, and promotion. In many cases, they are relevant for the entire Federal involvement in tourism and travel. More specific needs identified by meeting participants with particular agencies or programs can generally be associated with one or another of these broad programmatic needs. In this sense, such broad needs represent the range of suggested Federal responses to the large number of issues currently facing the tourism and travel industry.

The six broad programmatic needs discussed in this chapter are:

The need to step up program commitment or increase the level of program activity;

The need to refocus or revise program objectives or program criteria;

The need to eliminate or revise program activities with undesirable impacts;

The need to increase program effectiveness by simplifying bureaucratic procedures and improving program efficiency;

The need to improve coordination and eliminate program conflict and duplication;

The need to improve channels of communication and governmental responsiveness to the expressed needs and issues of the tourism and travel industry.

1. The Federal Government needs to step up its commitment to the tourism and travel industry, raise the priority level of tourism and travel, and increase Federal program activity where necessary to meet appropriate needs

Participants at the regional and national meetings expressed almost unanimous agreement that the tourism and travel industry is a "leaderless giant," lacking "legitimacy" and recognition as a major national industry, suffering from a poor public image of a somewhat frivolous and expendable sector of the economy. In essence, the tourism and travel industry needs to be recognized as a priority industry with major economic and social significance for the United States. Moreover, such recognition is needed in order to ensure that the industry receives equitable treatment in the Federal allocation and management of public revenues, technical assistance, energy, and other economic and natural resources.

Participants felt that virtually all of the significant issues or problems for the tourism and travel industry merited a greater Federal commitment and greater program activity of one sort or another. Specific agencies where an increased commitment or greater program activity was called for included the U.S. Travel Service, the U.S. Information Agency, the Bureau of the Census, the Federal Energy Administration, the Bureau of Outdoor Recreation, the National Park Service, the Civil Aeronautics Board, Amtrack, the Department of Transportation's Office of Facilitation, the Urban Mass Transportation Administration, the Federal Maritime Administration, the Department of Commerce, and the Department of Labor.

The reasons for the lack of recognition and low priority accorded to tourism are multifaceted, and the problem extends well beyond the Federal Government to State and local officials, the private sector, and the general public itself.

However, participants generally felt that the root causes of official and public indifference to the needs of the industry lie in a lack of awareness and appreciation for the breadth and impact of the industry on the public's social and economic well-being as well as the past inability of the tourism and travel industry itself to overcome fragmentation and effectively promote the interests of the industry as a whole with government officials and the general public.

By implication, the key to increasing the level of commitment to tourism at the Federal, State and local levels lies in educating public officials and the general public concerning the value and benefits associated with tourism and travel as well as overcoming industry fragmentation and developing an industry-wide consensus permitting effective support for interests shared by the industry as a whole.

This, however, is easier said than done. As one participant noted, tourism industry proponents have yet to find the "right formula" for convincing public officials of the importance of the industry; officials are frequently unresponsive to the simple argument that the tourism industry is a major economic stimulant. In effect, the industry needs to develop innovative strategies for convincing Government officials of the importance of tourism.

While many of the key decisions affecting the tourism industry at the State and local level are made by State and local officials, participants argued that a key element in increasing the level of commitment and priority accorded to tourism at the State and local level was a stepped-up effort and commitment among Federal officials and the U.S. Congress. It was repeatedly stated that if the Federal Government itself were to make a serious and well-publicized commitment to the tourism and travel industry, State and local officials would be much more inclined to be responsive to the interests of the industry.

Participants agreed that a multipronged approach to educating Government officials and the general population is called for, including the National Tourism Policy Study itself and efforts by the Congress, relevant congressional committees, and sympathetic high-level officials of the executive branch. Ultimately, however, the industry itself—including State and local tourism officials and representatives of the private sector—must be responsible for a large part of such

an educational campaign, and for such a campaign to be successful, efforts within the industry must be more effectively coordinated.

Several participants noted that a large part of such an educational effort by the private sector should be devoted to developing an effective constituency among the general public as well as among non-tourism segments of the private sector if Government officials are to be convinced of the significance of the industry and the importance of making Government more responsive to the industry's needs.

What are the prerequisites for educating such a constituency, in either the public or private sectors? The first need is for research to better define and conceptualize the tourism industry as a whole, to establish with accurate and credible data the dimensions and essential nature of the industry for the economic and social well-being of the population. This means coordinated and easily accessible research data on tourism expenditures, employment, tax revenues and other economic impacts; as well as greater in-depth research on the impacts of tourism and travel on the quality of life and the physical and social well-being of the individual population. Such data will allow tourism industry proponents to convincingly stress the economic value of tourism, its potential as a labor-intensive industry for generating full-time and part-time employment opportunities among the less skilled and among minority workers; its positive and widespread physical and mental health benefits; and its diverse contributions to the overall quality of life.

The second need is to develop an image of tourism and travel as an industry rather than as an individual activity. The general public and public sector officials need to be shown that tourism and travel represents not a series of fragmented activities, but instead constitutes an industry made up of "highly diversified but highly interrelated" segments. Focusing on the interrelatedness as well as the breadth of the industry's scope of activities will not only improve the general image of tourism; it will also support industry efforts to organize more effectively in support of industry interests.

Participants suggested that the Federal Government could assist in the informational process, first by supporting a large part of the additional research required and, second, by providing information on the value of the industry to State and local tourism officials and to private sector representatives for use in developing educational programs aimed at legislators and other State and local government decisionmakers. Simple measures to improve tourism's image were suggested for Federal agencies, such as switching, when referring to the industry, from the term "tourism" to something with more attractive and meaningful connotations for the public such as "tourism and travel." Top-level Federal officials were called upon to stress the importance of tourism and travel with Federal agencies within their purview. Moreover, the national tourism policy study itself was considered to be a most important vehicle for stimulating the process of industry understanding.

Beyond the need for a program of education, however, participants noted several other requirements for a successful enhancement of the priority assigned to tourism and travel by the Federal Government. The first and overwhelming need was for legislation "with some teeth

in it." Participants agreed that without legislated mechanisms for stimulating and, where necessary, enforcing a greater assigned priority and commitment to tourism and travel, tourism industry proponents could talk themselves "blue in the face" without achieving substantive results at the Federal level. In short, a national tourism policy needs to be backed by thoughtful legislation which will ensure that Federal agencies are responsive to the objectives of such a national tourism policy.

A second need is for high-level visible representation and appropriate organizational structures within the Federal Government to confirm the Government's commitment to tourism and travel and stimulate and enforce the assignment of a higher priority to tourism within individual Federal agencies. There was broad agreement at the regional and national meetings that a centralized tourism agency was needed with broad responsibilities for tourism coordination, liaison with the public and private sectors, and implementation of legislated incentives for prioritizing tourism and travel. Such an agency would, in effect, serve as the "voice" of the tourism and travel industry at the Federal level.

While there were a number of suggestions for the development of such an agency—including a restructuring of the U.S. Travel Service, a joining of several agencies currently involved in tourism activities, or the creation of a wholly new agency—participants appeared less concerned with the means by which such an agency was created than with the need for such an agency to be permitted sufficient independence within the Government to allow it to effectively discharge its responsibilities. In addition, participants felt that, at a minimum, the professional administrative head of such an agency should be accorded an appropriately high sub-Cabinet level status, and that the agency should receive effective representation by a Cabinet officer within the executive branch. Participants generally agreed that the definition and creation of a centralized tourism agency was a subject which required considerable additional study and discussion.

Some participants supported the development of an advisory council to such a centralized tourism agency made up of State tourism directors (each director representing a regional grouping of States) and of representatives of the private sector (perhaps drawn from a nucleus of travel directors and industry association representatives with experience in Washington, D.C.). This advisory council would have the responsibility of ensuring proper liaison and communication between the agency and State and local governments.

Another suggestion was put forward for a Federal intraagency coordinating council which would initiate and execute joint projects between different Federal agencies as well as ensure that individual agencies were fulfilling any mandates specified under national tourism policy legislation.

A third suggestion which received widespread support called for the organization of a White House conference on tourism and travel to bring together public and private segments of the tourism industry to highlight the significance of the industry and the Federal Government's stepped-up commitment to meeting the industry's needs.

In addition to structural reform, participants noted that a third essential requirement for successfully increasing the Federal Government's commitment to tourism is the provision of adequate funds to

ensure that national tourism policy legislation can be effectively implemented and that any additional activities required on the part of Federal agencies can be carried out.

Participants at the regional and national meetings were generally sensitive to the need to restrain increases in Federal spending and to avoid taking the path of simply adding additional layers of personnel onto the Federal bureaucracy. There was strong support for careful documentation of needs for additional funding, as well as for development of capabilities for new activities by increasing the effectiveness of current procedures and eliminating program duplication among agencies [see below].

Nevertheless, participants felt that tourism and travel had been underfunded in the past, and that without adequate funding and personnel where needed, a stepped-up Federal commitment to the industry would remain little more than a nominal gesture.

A fourth essential need to ensure a stepped-up Federal commitment is professional, experienced and prestigious leadership at the top levels of the Federal involvement in tourism and travel. Participants argued that recognized industry leaders from the public sector, private sector and the acedemic world are needed to fill key Government positions to establish the credibility of the Federal Government's commitment to tourism and to ensure that such a commitment is maintained over time.

2. The Federal Government needs to refocus or revise policy or program objectives or program criteria which are failing to address important needs in the tourism and travel field

In many cases, participants at the regional and national meetings argued that a simple increase in Federal funding or program activity was insufficient to meet an important tourism need—and frequently undesirable as well, given the need for greater Federal budgetary discipline. Rather, participants felt that the problem lay in program objectives which are inappropriate for meeting needs of the tourism industry or program criteria which exclude important segments of the industry from taking advantage of the economic, financial or technical resources afforded by such programs.

Participants felt that program objectives were inadequate to deal which a broad range of industry issues, including inadequate research for effective tourism planning and promotion; the inadequacy of surface and air transportation facilities; inadequate promotion of job opportunities in the industry; the difficulties of survival for small businesses; conflicts between the goals of environmental protection and tourism development; competition between public and private sector development on public lands; popular opposition to tourism development; seasonality problems; energy constraints; inadequate domestic and international tourism promotion; and inadequate facilitation of international visitors.

Specific agencies which were criticized for inappropriate program objectives or allocation of program resources included the U.S. Travel Service, the U.S. Information Agency, the Bureau of Security and Consular Affairs, the Immigration and Naturalization Service, the Bureau of Customs, the Federal Energy Administration, the Bureau of Outdoor Recreation, the National Park Service, the U.S. Forest Service, the Bureau of Land Management, the U.S. Army Corps of

Engineers, the Small Business Administration, the Economic Development Administration, the Occupational Safety and Health Administration, the Civil Aeronautics Board, Amtrak, the Urban Mass Transportation Administration, the Bureau of Indian Affairs, the Bureau of Reclamation, the U.S. Post Office, and the Department of Health, Education, and Welfare.

These agencies fall into one of two categories. The first is agencies which have objectives or mandates which are primary nontourism-oriented—and in which consequently tourism-oriented objectives are of only secondary or tertiary significance. As a result of this, program criteria are frequently structured in such a way that program resources are channeled only haphazardly or accidentally to groups, organizations or individuals in the tourism and travel field. In addition, when program resources are allocated for tourism and travel, program criteria frequently preclude them from being channeled to the groups, industry segments, or geographical areas with the greatest need for such resources.

Agencies or programs in the second category have tourism-oriented objectives or mandates, but are failing to meet important needs of the industry either because program objectives are vague or ill-defined, or because those responsible for developing program objectives or program criteria are unaware of or unresponsive to important needs of the industry. As a result, program objectives fail to focus on those needs and program criteria are frequently structured in such a way that the groups, organizations and individuals with the greatest needs are unable to qualify for the benefits or resources available through such programs.

The key to resolving the situation is, of course, to stimulate Federal agencies to refocus or revise their policy and program objectives or program criteria where appropriate to make them more responsive to the needs of the tourism and travel industry. But various participants noted that different means might be needed to bring this about.

On the one hand, for agencies which generally accord tourism a low priority in their activities, perhaps the most important requirement for bringing about a revision of objectives or program criteria is simply to stimulate or require the agency to accord tourism a higher priority—in other words, to increase the agency's commitment to tourism and travel through such means as those previously suggested, including educational campaigns, legislated incentives and requirements, some structural reform within the Federal Government, effective funding, and prestigious and professional leadership for tourism.

In this case, however, such an increased commitment would translate itself not simply into greater spending or activity in pursuit of current program objectives, but in a refocusing or expansion of objectives to reflect the higher priority accorded to tourism and travel industry needs. For example, one participant suggested that agencies should specifically set aside a certain proportion of agency funds, personnel, or other resources for tourism activities. Other recommendations centered around ways in which specific agencies should modify program criteria to permit specific types of tourism organizations, industry segments, or geographical areas to participate in program activities.

But expanding or refocusing program objectives—or program criteria—in order to satisfy prioritized tourism need simplies that agency personnel are fully aware of such needs and know how to effectively respond to them. For both tourism-oriented and nontourism-oriented agencies, it is also necessary for those who formulate program objectives and program criteria to better understand the specific nature of those needs and the reasons why current program objectives and criteria prevent the agency from responding effectively to those needs.

Thus, the process of refocusing or revising program objectives and program criteria is intimately related to other broad programmatic needs since it will be stimulated—in some cases—by a prioritizing of tourism, and will depend—in all cases—on an accurate assessment of current program objectives and program impacts as well as on an increase in agency responsiveness to industry needs. In order to increase agency responsiveness to industry needs, it is necessary to develop channels by which agency personnel can obtain a clear idea of the nature of those needs. This is where the national tourism policy study and similar forums for input from the State and local sectors and the private sector become critical.

3. The Federal Government needs to eliminate or revise policies or programs with undesirable negative impacts on the tourism and travel industry.

The very rapid expansion of Federal involvement in the tourism and travel field in recent years has, in many cases, led to Federal activities which have been counterproductive and which have exacerbated, rather than alleviated, many of the major problems and issues faced by the industry.

Participants criticized Federal involvement in three principal areas:

Federal regulation of private sector activities;

Direct Federal management or operation of tourism resources, facilities and services;

Federal activities which could be more effectively handled by State or local governments and which lead to inefficiency and program conflict and duplication.

Federal regulation of private sector activities was seen as exacerbating industry problems in a number of areas, including energy, small business survival, the low profitability and high costs of tourism development, inadequate surface and air transportation facilities, constraints to facilitation of international visitor traffic, and a lack of adequate travel information for the public on the Nation's highways.

Federal agencies whose regulatory activities came under criticism included the Environmental Protection Agency, the Internal Revenue Service, the Federal Energy Administration, the Federal Highway Administration, the Civil Aeronautics Board, the Immigration and Naturalization Service, the Bureau of Security and Consular Affairs, and the Bureau of Customs.

Frequently, participants' criticisms were focused on the complexity, inconsistency, rigidity and arbitrariness of many Federal regulations, rather than on the concept of regulation per se. In many instances, participants acknowledged that some form of public sector regulation was inevitable, necessary and even desirable to a degree; it was the

89-959—77——3

manner in which Federal regulatory activities had "gotten out of hand"—the uncontrolled growth of Federal regulatory activities and the lack of realism and accountability in much Federal regulation—which appeared to trouble participants the most.

Most of the criticisms of direct Federal management or operation of tourism resources and services centered around the activities of Federal public land agencies, such as the National Park Service, the U.S. Forest Service and the Bureau of Land Management. Direct Federal ownership and management of resources was seen as frequently leading to unfair competition with the private sector, to occasional mismanagement of resources and facilities, and to inadequate development of resources and facilities to meet the needs of the public.

The third area of participants' concern—Federal tourism activities which could be more effectively and responsively undertaken by State and local governments or the private sector—was focused principally on tourism development activities of Federal agencies, such as the U.S. Army Corps of Engineers and the Economic Development Administration. Because of the relatively peripheral involvement of the Federal Government in direct tourism planning or domestic tourism promotion, these areas of activity received less criticism. However, it was frequently noted that in both planning and tourism promotion the Federal Government should only involve itself in areas which are clearly beyond the capabilities or responsibilities of individual State and local governments or private sector organizations.

Several approaches were suggested for lessening the problems associated with too much Federal regulation or other involvement in the tourism and travel industry. The most widely agreed-upon was simply to cut back on Federal regulatory and nonregulatory activities where they were clearly gratuitous, ineffective and harmful to the interests of the industry and/or the public. Unless regulation could be clearly justified, participants felt there was a need to eliminate it. Similarly, participants called on the Federal Government to limit its activities to areas and approaches in the tourism and travel field with which States, local areas, and the private sector clearly cannot manage on their own. In particular, Federal officials need to avoid the natural tendency to introduce more and more Federal involvement as a catch-all or makeshift "solution" to the problem confronting the tourism industry.

Another widely mentioned suggestion was the institution of a Federal requirement for an impact assessment study of new Federal agency activities (whether regulatory or nonregulatory) prior to the actual implementation of regulations or commencement of other activities. Such a tourism impact statement would require a study of both the economic costs and benefits and noneconomic impacts associated with proposed Federal actions, in a somewhat similar vein to the environmental impact statements required to conform with provisions of the National Environmental Policy Act and the recently implemented requirement of the executive branch for economic cost studies of proposed Federal agency activities. It would involve analysis of both the potential positive and negative impacts of proposed agency activities on the tourism industry as a whole and on particular relevant segments of the industry (or geographical regions or localities).

A third suggestion was for an independent Federal agency to act as a monitor and coordinator of such tourism impact assessment studies within the Federal Government, and to serve as well as a clearinghouse for State and local officials and private sector representatives to register criticisms and complaints concerning Federal tourism activities. The agency would be responsible for assisting to channel such complaints to the appropriate agencies and for insuring that an appropriate response was forthcoming.

Such an independent clearinghouse agency would also be responsible for surveying, on an ongoing basis, the entire regulatory structure at the Federal level with an eye to identifying and working to eliminate conflicts in regulations in different agencies which effectively make it impossible for those subject to such regulations to properly comply.

A fifth approach mentioned was to require that Federal agencies carefully justify any new regulatory or nonregulatory activities on the basis of national interests or the needs and requirements of specific segments of the population, the State and local public sectors, or the private sector. In line with this, many participants argued that blanket authorizations to Federal regulatory agencies should be sharply curbed, with Federal regulatory activities subject to closer control by Congress through a requirement for specific congressional approval of new important regulatory rulings.

While participants called for consistency in development and enforcement of regulatory rulings, they also suggested that Federal agencies in enforcing regulations should be more flexible and sensitive to special conditions, requirements or constraints faced by those being regulated in the tourism industry. Frequently, alternative modes of compliance or the provision of greater lead times for compliance would have offset very high costs associated with inflexible enforcement of regulations.

In addition, several instances were cited where Federal regulations designed to alter conditions in another industry were inadvertently having negative consequences for the tourism industry. In these cases, participants called for an exemption from such regulations.

There was also a call for improved channels of communication and greater consultation between Federal agencies, State and local officials, and the private sector during the formulation of Federal agency regulatory and nonregulatory activities. Such improved communication is needed to assist Federal agencies in developing regulations and other program activities which meet the needs of the tourism industry, rather than work against them. Moreover, only through improved communication channels can private firms and public agencies in the tourism industry understand why they are being regulated, what they must do to meet regulations, and how they can appeal if they feel they are being unjustly treated.

4. The Federal Government needs to increase the effectiveness of Federal programs by simplifying bureaucratic procedures and improving program efficiency

Even where the objectives of Federal programs have addressed themselves adequately to problems facing the tourism industry, these programs have sometimes been ineffectively administered or implemented. As identified by participants at the Regional and National

Meetings of the NTPS, such ineffectiveness has generally arisen from the following sources:

Complex and time-consuming bureaucratic procedures;

A lack of sufficient professional training or experience on the part of the agency staff;

Inadequate, poorly-designed, or poorly-located physical facilities;

Inadequate and/or unimaginative strategies for implementing programs;

A lack of continuity or uniformity in the implementation of policies or programs throughout the operational network of a given agency.

Federal agencies which participants specifically criticized for various aspects of their program administration or implementation included the U.S. Travel Service, the U.S. Information Agency, the Bureau of Outdoor Recreation, the U.S. Forest Service, the Small Business Administration, the Environmental Protection Agency, the Occupational Safety and Health Administration, the Civil Aeronautics Board, and the Bureau of Indian Affairs. Other agencies were indirectly implicated as well.

Participants felt that ineffective implementation of Federal programs had exacerbated inadequacies in tourism development activities, difficulties for small business survival, conflicts between environmental and developmental goals, energy constraints on development, and inadequacies in promotion of travel opportunities in the United States, both domestically and internationally.

By far, the most common complaint among participants centered around the growth in overly-complex, time-consuming, and costly bureaucratic procedures. Most frequently, problems were encountered in obtaining regulatory approvals or approvals of applications for Federal financial or technical assistance.

The complexity of such procedures frequently made them confusing and difficult to comply with. Participants in both the public and private sectors complained about the enormous amounts of seemingly repetitive paperwork which had to be undertaken in meeting regulatory criteria or attempting to gain financial or technical assistance. In addition, long delays were often encountered between the completion and submittal of regulatory or application forms and eventual approval or disapproval by a particular Federal agency. In addition, it has often been difficult to obtain simple, clear explanations of the rationale behind procedural matters or regulatory rulings in some Federal agencies.

A second source of ineffectiveness has arisen from inefficient, inexperienced, or poorly trained agency staff or administrators. In some cases, there was a feeling that agency personnel were simply poorly trained for specific tasks and responsibilities relating to tourism. Particularly at the staff level, criticism on this point appeared to be directed primarily towards agencies which did not have tourism as a principal focus of their mandated activities. Given the low priority assigned to tourism within such agencies, it is not surprising that agency staff may be often relatively inexperienced or insufficiently

skilled to deal with tourism and travel matters. A larger source of concern on the part of participants, however, lay with the practice of making political appointments to administrative positions within tourism or tourism-related agencies with little regard for the professional credentials and experience of the appointees. There was a general feeling that this practice has had a debilitating effect on some agencies' capabilities for efficiently carrying out their responsibilities as well as on their capability for maintaining credibility and influence both within the tourism industry and among high officials of Federal, State, and local governments.

Some Federal agencies—particularly those concerned with tourism promotion, such as the U.S. Travel Service and the U.S. Information Agency—were criticized for maintaining inadequate, poorly designed, or poorly located physical facilities. Often, the inadequacy of such facilities appeared to be simply a reflection of inadequate agency budget. In other cases, agency programs had other non-tourism-related objectives which influenced the type and location of facilities maintained by the agency for carrying out tourism programs. For example, the offices of the U.S. Information Service overseas are generally located within or adjacent to the grounds of U.S. embassies or consulates because of the broad nature of the mandate given to the U.S. Information Agency and the fact that the Agency has worked closely through State Department diplomatic personnel and channels for many years. Participants felt that this "political orientation" hurt the ability of the U.S. Information Service to promote international travel to the United States.

In other cases, the inadequacy of facilities appeared to reflect the particular strategies chosen by an agency for implementing its programs and attaining program objectives. The U.S. Travel Service, for example, has focused its promotionl efforts on the wholesale trade segment of the international market rather than emphasizing direct appeals to potential foreign consumers, and this strategy is reflected in its choice of international office locations which are not accessible to the foreign tourism consumer.

Inadequate strategies for implementing agency programs was a fourth principal source of ineffectiveness cited by participants. Such strategies were most frequently inadequate because they were insufficiently innovative and responsive to changing conditions. The lack of innovation and responsiveness, however, appeared to arise from a lack of accurate measurement and understanding of the actual impact of program activities and the degree to which agency activities were actually attaining program objectives. In other words, an adequate internal system of evaluation appeared to be lacking.

A fifth source of ineffectiveness—a lack of continuity or uniformity in the implementation of policies or programs throughout a given agency's operational network—was largely a problem of internal coordination within an agency. Participants recognized that uniformity was not always desirable in program implementation, particularly where unique local problems or conditions need to be taken into account. There was, however, a feeling that some agencies lacked a set of uniformly coordinated and applied standards, guidelines, and criteria for program implementation.

Participants made several suggestions for increasing the effectiveness of Federal programs in the tourism and travel field. The first was to vastly simplify, rationalize, and streamline bureaucratic procedures. In some cases—such as regulatory approvals—it was clear that streamlining of procedures could not be undertaken at the expense of careful consideration and judgment of relevant factors. Because of the complexity of many regulatory issues, such judgment can invariably be seen as time-consuming. However, in the area of paperwork and procedural channels, participants felt that much could be done to reduce duplication and often meaningless, unnecessarily complex, and arbitrary requirements. It was also felt that agencies needed to devote more attention to educating and assisting the tourism industry to become proficient in working within Federal bureaucratic channels.

Participants called for a revision in the criteria for making appointments to top-level administrative and leadership positions in Federal agencies involved in tourism to eliminate political considerations in choosing appointees. They argued that tourism agency administrators and staff should be chosen on the basis of training, previous experience in the industry and prestige within the industry. It was also felt that greater numbers of skilled and qualified personnel would be attracted to Federal agencies involved in tourism if successful efforts were made to improve the prestige accorded to tourism and tourism-related agencies at the Federal level. In addition, stepping-up the Federal Government's overall commitment to tourism and mandating such an increased commitment on the part of specific agencies would also have a positive impact on the training procedures and staffing skills required within particular Federal agencies.

Participants felt that a highly visible increase in the Federal Government's commitment to tourism along with the adoption of specific mandated requirements for some agencies was perhaps the best approach to stimulating an improvement in agency facilities and the development of more innovative and responsive strategies for implementing programs. In some particular cases, increased budgetary allocations were also deemed necessary and desirable. Within the agencies themselves, however, the adoption of ongoing procedures for assessing the impact of current policies and programs on the tourism industry was considered the most important means for insuring that program strategies were effectively designed to attain objectives.

Finally, participants called for improved intra-agency channels of communication between agency staff in Washington, D.C., and personnel in regional field offices in order to insure that the behavior of field personnel and the policy criteria employed by them were uniformly applied on a consistent basis.

5. *The Federal Government needs to improve coordination and eliminate conflict and duplication among Federal program activities of State and local governments and the private sector*

The current fragmentation of the Federal Government's involvement in tourism and travel as well as the fragmentation existing within the private sector and the State and local public sectors of the industry means that increased coordination of efforts and activities in the tourism field is one of the most pressing requirements for an efficient and effective involvement in tourism on the part of both the

public and private sectors. In a sense, greater coordination among all sectors and segments of the public and private sectors is an implicit requirement for meeting any of the other broad programmatic needs of the industry, from stimulating a stepped-up Federal commitment to tourism to effectively refocusing program objectives and improving channels of communication.

Participants at the regional and national meetings felt that numerous Federal agencies needed to increase intra- and interagency coordination, including the U.S. Travel Service, the U.S. Information Agency, the Bureau of Customs, the Immigration and Naturalization Service, the Civil Aeronautics Board, the Bureau of the Census, the National Park Service, the U.S. Army Corps of Engineers, the Economic Development Administration, the Occupational Safety and Health Administration, the Internal Revenue Service, the Department of Commerce, and the Department of Labor.

Problems which participants felt were being exacerbated by a lack of coordination included inadequate research for planning and promotion, inadequate planning for tourism development, inadequate development of tourism attractions and facilities, inadequate surface and air transportation facilities, inadequate promotion of job opportunities in the tourism industry, conflicting goals of environmental protection and tourism development, competition between public and private sector development on public lands or adjacent areas, popular opposition to tourism development, inadequate domestic tourism promotion, inadequate overseas promotion, inadequate facilitation of international visitors, and inadequate promotion of international conventions and meetings.

At the Federal level, greater interagency coordination is needed in order to deal with conflicting objectives of different agencies. While many participants at the regional and national meetings were aware that some conflict in individual agency or departmental mandates and policy objectives is inevitable and even desirable (given that different agencies often work to satisfy the conflicting interests of different groups within the population), there was concern expressed that conflicts in policies and programs were too frequently detrimental to all parties. For example, participants felt that greater coordination was definitely needed in order to eliminate or adjudicate many of the conflicts existing among Federal regulatory rulings which make compliance difficult if not impossible on the part of the industry. Similarly, where Federal agencies provide financial or technical assistance for tourism development or promotional activities, participants considered greater coordination necessary to insure that such assistance was distributed in support of activities which were complementary rather than directly competitive, in order to avoid reducing the beneficial impacts of such assistance for all concerned.

Participants also felt that greater coordination at the Federal level on both an inter- and intra-agency basis was necessary in order to eliminate duplication of program activities and develop a more rational approach to the setting of priorities for determining program objectives and allocating moneys and technical assistance. Uncoordinated duplication of effort has often led to wasted money and inefficient program activities. Where conflict is inevitable and/or desirable in priorities among various agencies, greater coordination

of activities would at least alert agency personnel to those inherent conflicts and would permit them to undertake measures to adjust program implementation in the light of such conflicts.

There was a frequently expressed feeling that Federal tourism programs needed to support and complement rather than compete with State and local tourism programs and activities of the private sector. Participants generally agreed that there were many areas where the private sector or the State and local public sector could probably do the most effective job—in tourism research, planning, development, and promotion with a regional or local focus, for example. However, many participants felt that the Federal Government had a legitimate role to play in coordinating State and local public sector and private sector activities where such coordination would enhance the quality or usefulness of activities being undertaken by State and local representatives or would spread the benefits of such activities to other segments of the tourism and travel industry. Coordinated tourism research and planning were important examples cited by participants.

A number of suggestions were advanced for new mechanisms to improve and step up coordination and reduce conflict and duplication at the Federal level and among Federal, State, and local governments and the private sector. The most popular suggestion was for a centralized tourism agency based on a restructured U.S. Travel Service or some similar Federal agency which would coordinate tourism and travel activities among the numerous Federal agencies involved in tourism. The agency would have broad responsibilities for coordinating tourism research, promotion, development, and national planning activities within the Federal Government and between the Federal Government and State and local governments and the private sector. The primary objective of this coordinating function would be to maximize the effectiveness of the Federal Government's involvement in tourism and travel and to stimulate the achievement of maximum benefits from the activities of State and local public and private sectors.

Other participant suggestions included a national coordinating task force made up of public and private sector representatives, a Cabinet-level officer with office and staff specifically responsible for coordinating the tourism and travel activities of the Federal Government, and the appointment of a Presidential staff assistant for tourism and travel to undertake the same. Other suggestions included the formation of inter-agency coordinating councils and councils made up of public and private sector representatives to facilitate coordination between Federal activities and State, local, and private sector activities in one particular functional area such as research.

6. The Federal Government needs to improve channels of communication with State and local governments and the private sector and Federal agency responsiveness to State and local public sector and private sector needs

Participants at the regional and national meetings argued that improved vertical channels of communication were a prerequisite if Federal agencies were to accurately assess the positive and negative impacts of their program activities at the State and local level and from that, refocus program objectives or revise the manner of implementing programs in order to increase responsiveness to State and

local public and private sector needs. Without widespread and well-developed institutionalized means for soliciting inputs from public sector officials and private sector representatives at the State and local level, Federal officials have often had difficulty in accurately grasping and understanding the needs and problems of the tourism and travel industry at the State and local level. Without proper understanding, it has been impossible for Federal agencies to be fully responsive to State and local needs.

Participants also noted the need for enhanced horizontal channels of communication among Federal agencies. In the past, they argued, a lack of well-developed communication channels had, in some instances, been a prime contributor to conflicts, inefficiencies and duplication in Federal program activities. As one participant put it, frequently at the Federal level, the "right hand finds itself opposing the left hand."

Federal agencies which participants directly mentioned as needing to develop better channels of communication and responsiveness to industry needs included the U.S. Travel Service, the Bureau of Customs and the Immigration and Naturalization Service, the Federal Energy Administration, the Bureau of Outdoor Recreation, the National Park Service, the Bureau of Land Management, the U.S. Army Corps of Engineers, the Economic Development Administration, the Civil Aeronautics Board, the Bureau of Indian Affairs, and the Federal Trade Commission.

Participants felt that inadequate channels of communication have intensified a number of problems in the industry, including inadequate research for tourism planning and promotion, inadequate planning for tourism development, inadequate development of services and facilities, competition between public and private sector development on public lands, energy constraints and inadequate domestic tourism promotion.

To rectify this situation, participants argued strongly for the institutionalization of procedures which would insure a continuous dialog between the Federal Government and States, cities and the private sector. Specific suggestions included a legislated requirement that agencies solicit inputs of State and local officials and the private sector in developing agency policies and programs; the establishment of an advisory board on tourism to provide inputs to policy considerations by relevant congressional committees or Federal agencies; improvement and expansion of the regional public hearing process undertaken by Federal agencies involved in regional and local tourism planning and development projects; and the establishment by the private sector of an industry review process for Federal appointments to the tourism field similar to that undertaken by members of the legal profession in the review of appointees to the Federal courts.

There was also a desire on the part of city and private sector representatives for Federal support and encouragement for the development of separate, independent, and direct channels of communication to the Federal level which would bypass State governments and provide an opportunity for input to Federal policies and programs specifically reflecting the tourism and travel needs of cities or particular segments of the private sector.

Communication problems lie not only with the flow of information from the State and local level to the Federal level, however. The

results of the regional and national meetings strongly indicate that State and local tourism and travel officials (as well as private sector representatives) are frequently poorly informed concerning Federal program activities and experience difficulties in obtaining adequate information on the nature of Federal programs, opportunities for assistance available at the Federal level, and the means for taking advantage of such opportunities. While becoming knowledgeable about Federal policies and program activities is obviously a responsibility of State and local officials as well as the Federal Government, participants felt there were many things the Federal Government could do to increase the level of knowledge of State and local officials concerning Federal program activity.

Participants called for the institutionalization of procedures to make available on a continuing basis information on Federal tourism legislation, Federal program opportunities, and the programs and activities of States and localities. Many participants supported the concept of a Federal informational clearinghouse which would coordinate the collection, organization, and dissemination of such information. Participants suggested that such a clearinghouse could be located in a restructured U.S. Travel Service or other Federal agency, similar to the suggestion for centralizing coordination of Federal tourism activities in a single agency.

The clearinghouse agency would also serve as a "hot-line" for requests by State and local officials or private sector representatives for information and advice on Federal program involvement and program opportunities in a particular area or for assistance in dealing with other agencies involved directly or indirectly in tourism, such as regulatory agencies.

Several participants supported the concept of an office or individual in each Federal agency with direct or indirect involvement in tourism who would be responsible for tourism-related activities and liaison with the tourism and travel industry. A related suggestion called for the establishment of improved visitor centers within each of the Federal agencies involved in tourism in order to improve visitor access and provide a better understanding of the inner workings of such agencies.

Another suggestion receiving widespread support was for the development of a continually updated inventory survey of Federal programs relating to tourism and the manner in which they function. Many participants supported the idea of placing the responsibility for preparing such an inventory listing with the centralized clearinghouse mentioned above.

Other participants noted that such a list, as well as other informational materials disseminated on Federal program activities, needed to be designed in such a way that State and local officials could easily grasp the scope, significance, and applicability of Federal policies and programs to their own areas of responsibility. Some suggested adopting a marketing approach to disseminating such information, using a simple and commercialized style which would attract the attention of State and local officials and facilitate their understanding of materials.

In addition, participants argued that Federal agencies should undertake greater participation in travel shows and conferences set up by State and local promotional agencies and should make full use of regional offices of Federal agencies for educating State and local officials on Federal program activity.

CHAPTER IV.—PROGRAMMATIC NEEDS BY ISSUE

In chapter III we discussed the broad needs for programmatic change at the Federal level identified by participants at the regional and national meetings of the National Tourism Policy Study. This chapter contains specific needs identified by participants for programmatic change in order to deal with the specific issues confronting the tourism and travel industry discussed in chapter II.

These specific issues include:

Inadequate research for effective tourism development planning and tourism promotion;

Inadequate planning for site-specific, regional, and national tourism development;

Inadequate development of tourism attractions, services and facilities;

Inadequate surface and air transportation facilities and services;

Inadequate development of facilities and services for foreign visitors to the United States;

Inadequate promotion of job opportunities in the tourism and travel industry;

Difficulties of survival for small businesses;

Competition between public and private sector development on public lands or on adjacent areas;

Conflict between environmental protection goals and tourism development goals;

Popular opposition to further tourism development in some areas;

The negative effects of seasonality cycles on the tourism and travel industry;

The rising costs and declining availability of energy in general and petroleum in particular;

Inadequate dissemination of information concerning the wide range of tourism opportunities, facilities, and services available in the United States and of the means for taking advantage of them;

Inadequate dissemination of information concerning specific regional, State, or local tourism attractions, sites, and facilities;

Inadequate overseas promotion of travel opportunities in the United States;

Inadequate facilitation of international visitors;

Inadequate promotion among foreign organizations of potential opportunities for holding international conventions, fairs, and meetings in the United States;

Inadequate numbers of skilled, professional personnel in the tourism and travel industry; and

Inadequate consumer protection for the tourism or traveling public.

These programmatic needs have been arranged by issue category, and by the category of broad programmatic need into which they fall. Thus, for example, the need to step up technical assistance to small tourism businesses falls under the issue of "Difficulties of Survival for Small Businesses in the Tourism and Travel Industry." Within that issue category, it is placed under "Need to Step up Commitment or Increase Program Activity."

Some programmatic needs identified are applicable only to the Federal Government. But a large number of them were considered by participants to be applicable as well to State and local governments and/or the private sector. In some cases, programmatic needs were applicable only to State and local governments or the private sector.

In some cases, particular needs for programmatic change may appear to be in conflict with one another. For example, there could exist, in particular instances, a conflict between the private sector's need for an increase in user charges for publicly owned tourism attractions and facilities (to protect private sector firms from unfair competition) and the need to provide greater subsidized recreational opportunities for the economically disadvantaged.

For most of the suggested programmatic changes, there are inherent tradeoffs with other policy and program objectives which must be carefully assessed, both in the further stages of the National Tourism Policy Study and by Government policymakers and the private sector on an ongoing basis. As was pointed out in the introduction, at this stage of the NTPS no attempt has been made to achieve consistency among suggested programmatic changes or to establish a firm consensus among participants or other interested parties concerning the need for any particular programmatic change. Some suggested needs received widespread acknowledgment and support, while others were less frequently mentioned and emphasized.

Most of the needs identified in this chapter are indexed to responses to specific questions asked during the followup survey to the regional and national meetings.[1] These responses are detailed in appendix C. The results of the survey provide some insight into the relative importance and meaning attached to particular programmatic needs by participants at the meetings. The results should be interpreted, however, in the light of the relatively small sample from which they were drawn.

The large majority of participants at the regional and national meetings were designated public sector individuals involved in tourism development and promotion or representatives of private

---

[1] Index numbers appear at the end of need statements.
R = Research.
PL = Planning.
D = Development.
PR = Promotion.

sector interests. Naturally enough, the programmatic needs identified at the meetings are frequently reflective of the interests of those individuals and groups.

Thus, the programmatic needs identified do not necessarily represent the entire universe of opinion which may be encountered among various individuals and groups which are either peripherally or centrally involved in tourism and travel. Nor do the needs identified necessarily encompass all of the programmatic changes which may be required to meet the diverse national interest in tourism and travel.

A small number of needs are not indexed to specific survey questions for one of three reasons: (1) the need is of a general nature which was not easily formulated in terms of a specific survey question; (2) the need represents a specific strategy for meeting a basic or underlying need; (3) the need overlapped with other needs mentioned at the regional and national meetings and was thus represented by these other needs included for ranking in the questionnaire.

INADEQUATE RESEARCH FOR EFFECTIVE TOURISM DEVELOPMENT PLANNING AND TOURISM PROMOTION

Needs involving a stepup in program commitment or increase in program activity

A stronger, more extensive, and more credible tourism research data base is needed by the tourism industry. Federal, State, and local governmental research activities need to be stepped up, research techniques improved, and the scope of such activities broadened in three areas:

> Patterns of personal travel, including travel flows by point of origin and destination, means of transportation, patterns of consumption of tourism services and facilities, personal travel expenditures, and so forth;
>
> Domestic and foreign traveler and nontraveler motivations, needs, and requirements;
>
> The economic impacts of tourism and travel on a national, regional, State, local, and project-specific level; income generated; Federal, State, and local tax revenues attributable to tourism activities, and so forth.

Such research is needed in order to (*a*) support efforts to raise the priority of tourism and travel in the eyes of the public and among government officials; (*b*) assist the industry in effective planning for profitable tourism development; and (*c*) assist the public and private sectors of the industry in understanding the tourism needs of the general public and thereby increase the effectiveness of planning and promotional activities in meeting those needs (R–3; R–5; R–9; R–12).

Federal funding for the National Travel Survey needs to be increased to broaden the scope of the Survey, permit the use of more thorough data collection procedures, and allow for the performance of at least an update of the quinquennial Survey on an annual basis (R–1).

Federal funding needs to be increased for State and local government research activities in order to increase the amount of research

undertaken with a State and local focus. State and local research should be undertaken primarily by State and local government agencies—or the private sector—rather than by the Federal Government (R–2).

Both the Federal Government and the private sector need to provide greater funding for the research activities of the U.S. Travel Data Center.

Needs involving a refocusing or revision of program objectives or program criteria

The Federal Government needs to develop a series of national economic indicators for the tourism industry similar to the Commerce Department's series of leading economic indicators for gross national product, industrial production and the like. In addition, the Federal Government should develop a standard industrial classification code [SIC] for the tourism and travel industry (R–6).

Research is needed by the Federal Government to establish accurately the relatively inexpensive costs of job creation in the tourism industry and the industry's potential as a generator of jobs for less skilled and minority workers (R–23).

The Federal Government needs to assist States and local areas in research activities aimed at developing data necessary for the performance of cost-benefit and project feasibility planning studies for local and regional tourism development projects (R–2).

Research activities of the public and private sector need to focus on developing data which is useful for State and local decisionmaking in the areas of tourism planning and development. In addition, research should be designed to support the development of solutions to the industry's key problems (R–4; R–10).

Needs involving improved coordination or elimination of program duplication

The Federal Government needs to establish guidelines for common definitions of tourism terms, standardized data categories, and standardized methodologies for data collection. Definitions of terms should be simple, clear and specific. Data categories should be responsive to the needs of the tourism industry. Such standardization will permit national comparability in research data and comparative analysis between different regions and localities and among tourism and other industries (R–15; R–19).

The Federal Government needs to ensure that such standardized methodologies and approaches are followed by other Federal agencies whose social and economic research data collection activities are relevant to the needs of the tourism industry. At the same time, State and local governments and the private sector need to agree on the use of such standardized research data terms, categories, and methodologies (R–16; R–20).

The Federal Government needs to coordinate the aggregation of the various research findings of State and local governments and private sector organizations and associations and the dissemination of such research data on a nationwide basis at various levels of disaggregation. (R–14; R–21)

A clearinghouse agency needs to be established at the Federal level to administer and coordinate the collection and dissemination of research data generated by Federal agencies, State and local governments, and the private sector. (R–17; R–18)

Needs involving improved channels of communication and agency responsiveness

The Federal Government needs to establish better channels of communication with State and local government agencies and private sector organizations involved in tourism research in order to:

Support coordination of research activities;

Ensure that Federal research activities are responsive to State and local needs; and

Ensure that State and local officials are aware of the availability of tourism research data from Federal agencies, from other State and local governments, or from the private sector.

INADEQUATE PLANNING FOR SITE-SPECIFIC, STATE, REGIONAL, AND NATIONAL TOURISM DEVELOPMENT

Needs involving a step-up in program commitment or increase in program activity

Tourism planning (for both specific projects and for regional development) needs to be stepped up at all levels of government and in the private sector to deal with (*a*) the need for increased efficiency of capital investment; (*b*) a finite supply of natural resources; (*c*) increasing public demand for tourism and recreational resources; (*d*) increasing interdependence of all segments of the tourism and travel industry. Long-range planning for tourism development should be stepped up in order to accommodate long-range secular changes in industry conditions such as increased costs of energy, decreasing availability of land, degradation of the environment, changes in leisure time interests amongst the population, and the like. (PL–7)

A nationally coordinated planning process is needed for tourism and tourism-related planning by Federal, State, and local agencies. National tourism planning needs to be based on and integrated with State and local planning efforts. Integrated planning will reduce duplication of effort and increase the effectiveness and realism of planning at all three levels of government. The most frequently recommended means for achieving integrated tourism planning was through an expansion of the Bureau of Outdoor Recreation's State comprehensive outdoor recreation plan (SCORP) program to include tourism and travel as well as outdoor recreation—perhaps in coordination with the U.S. Travel Service—(PL–5; PL–6; PL–11).

Public land agencies need to step up planning activities for recreational facilities on federally owned and managed recreational lands in order to effectively meet the variety of recreational demands which will be put on public recreational lands in the short-term future (PL–1).

Federal agencies and State and local governments need to undertake greater planning of the development and distribution of recreational water resources in water-scarce—mostly western—regions of the United States. (PL–2)

Needs involving improved coordination or elimination of program duplication

Coordinated dissemination of the findings of federally funded cost-benefit and project feasibility studies is needed both to assist State and local governments directly in planning and to act as a form of technical assistance for State and local public agencies and private sector organizations in undertaking project feasibility planning. (PL–10)

Needs involving improved channels of communication and agency responsiveness

Federal agencies involved in tourism planning—either for specific projects or for regional economic development—need to solicit greater inputs from State and local governments concerning their specific tourism development needs. This includes the Bureau of Outdoor Recreation, the Economic Development Administration, the Bureau of Indian Affairs, and other agencies. (PL–12)

INADEQUATE DEVELOPMENT OF TOURISM ATTRACTIONS, SERVICES, AND FACILITIES

Needs involving a step-up in program commitment or increase in program activity

Tourism and travel facilities in the United States need to be greatly expanded and improved. The United States is an "underdeveloped country" relative to other developed nations in terms of the level and quality of services available.

The Federal Government, State, and local governments, and the private sector all need to step up integrated planning for tourism development in order that future development of tourism facilities and services will be of the right kind and will be undertaken in the right place to meet the demands of the consuming public. (PL–5; PL–11)

Federal, State, and local officials need to be impressed with the need of the private sector of the tourism industry for adequate profits to provide future growth. Because of the current low profitability of the industry, insufficient resources are being developed to satisfy future demands for high-quality services. (D–11)

The Federal Government needs to expand its financial and technical assistance to States and local governments for development of tourism and recreational facilities, including direct grants, matching-fund grants, loans and loan guarantees. (D–7)

Favorable Federal investment incentives need to be provided to stimulate greater private sector development of tourism facilities in segments of the tourism industry such as lodging and recreational attractions. In particular, the tourism industry should be granted the same investment tax credits that the Federal Government currently allows manufacturing industries. (D–5; D–28)

The Federal Government needs to expand development of public parklands and recreational facilities in both rural and urban areas. (D–4)

Federal public land agencies such as the National Park Service and the U.S. Forest Service need to step up development of tourism and recreational facilities either within or adjacent to national parks, national forests, and other public recreational lands. Agencies need greater funding and staffing for facilities development and maintenance. In addition, public works programs of the Federal Government should be designed to support development of facilities on or adjacent to public recreational lands. Current National Park Service policies aimed at limiting or removing concessional and lodging facilities from the national parks needs to be carefully examined. (D–4; D–6; D–56)

Funding also needs to be stepped up for Federal agencies funding tourism development such as the Bureau of Outdoor Recreation, the Economic Development Administration, the U.S. Army Corps of Engineers, the Department of Housing and Urban Development, etc. (D–28; D–7)

The Federal Government, State and local governments, and the private sector need to work in concert to step up efforts to develop tourism facilities and services which will be readily available to the economically disadvantaged, minorities, the aged and the physically handicapped. (D–8)

The Federal Government needs to provide greater financial and technical assistance for development of recreational facilities adjacent to municipal areas which will be easily accessible to lower-income groups. In addition, the public sector needs to step up programs which facilitate or subsidize transportation access to tourism attractions and facilities for low-income groups. Finally, where user-charges directly support tourism atrractions and facilities, provisions need to be made to subsidize charges to low-income users. (D–26; D–30)

The public sector also needs to step up efforts to develop specialized facilities and services for the handicapped and the aged. In many cases, relatively simple modifications in facilities can result in greatly improved access to facilities for such groups.

Federal agencies with responsibility for administering public recreational lands need to alleviate problems created by overuse and overcrowding at popular recreational sites by emphasizing development of recreational facilities and services at less-visited, less-well-known recreational sites with development potential. In addition, improved techniques for managing resources need to be introduced to cope with potential negative effects of such increased demands on the resource base of popular recreational lands in the public domain.

Greater financial and technical support is needed from both the public and private sectors for development, renovation, and preservation of national historical sites and cultural facilities in various regions and localities of the United States. In particular, the Federal Government needs to increase its commitment to preservation of historical sites through the National Landmarks Committee and to stepup funding assistance to State and local governments and local

nonprofit groups. In addition, the National Historic Register needs to provide greater guidance to property owners on the development of historic properties as sites of public interest and as part of our national tourism resource base. (D–10)

The tourism and travel industry needs to concern itself more with the quality and appearance of tourism facilities and services. The consuming public has grown more sophisticated and discriminating in its demand for services, at the same time that maintenance of the quality of services has grown more difficult due to reduced industry profitability in recent years.

Self-regulation of the quality of services by individual organizations and industry associations is the most desirable remedy to the problem. However, the Federal Government and State governments can encourage private industry through the development of guidelines for quality and uniformity of services in some segments of the industry.

The private sector needs greater technical assistance from the public sector on the construction and interior design of tourism facilities to meet the needs of different types of travelers such as international visitors and large convention groups. (D–41)

Needs involving a refocusing or revision of program objectives or program criteria

In developing criteria for the allocation of funds for tourism development, Federal, State, and local officials need to view tourism as an interrelated process with widespread economic, social and environmental impacts rather than as a destination-oriented activity with only limited local impacts. (D–29)

Federal and State agencies involved in economic development need to formulate specific priorities for funding tourism development projects through their economic development programs; for those agencies already possessing specific priorities, in many cases the priorities assigned for development of tourism facilities needs to be increased. (D–25; D–33)

Thus, for example, the Department of Housing and Urban Development needs to revise current policies to permit the use of urban renewal bloc grants specifically for development of urban tourism and recreational facilities.

Federal revenue-sharing and other pass through funding programs need to specifically include tourism facilities development as an acceptable use of funds where program goals are economic development, employment stimulation, nonpollutive development, or improved quality of life.

Regional development commissions need to set aside a fixed percentage of their economic development budgets for tourism development programs. In the past, the development activities of regional commissions have occasionally hindered rather than supported expansion in needed tourism and recreational facilities and services. (D–27)

States and local governments need to earmark a specific percentage of sales and lodging tax revenues for support of tourism facilities, attractions and services.

The criteria by which Federal matching funds for tourism development are distributed by agencies such as the Small Business Administration, and the Economic Development Administration, need to be made more flexible and responsive to the needs of the tourism industry. (D–23)

Federal agencies with economic development responsibilities need to take greater account of local recreational and tourism requirements in their sponsorship of development projects.

Moreover, Federal public land agencies need to develop criteria for development of public recreational lands which are flexibly responsive to regional recreational needs rather than rigidly uniform across the country. (D–31; D–49)

A number of Federal agencies administering matching-fund development programs need to revise the criteria used in allocating such matching funds to insure that smaller, less populated States have a better opportunity to receive development funding. (D–24)

In addition, Federal funds for the development of State parks need to be allocated on a more equitable basis from State to State (partially based on the number of out-of-State users of such parks). (D–32)

Needs involving elimination or revision or program activities with undesirable impacts

Federal regulation of tourism facilities development needs to be rationalized and simplified. Frequently, such regulation has had significant negative impacts on industry profitability and the ability of the industry to generate or borrow capital for new investment. In addition, time-consuming regulatory procedures have often delayed investment projects, escalating development costs and, in some cases, leading to actual abandonment of planned investment projects. Developers have often encountered difficulties in obtaining commercial credit because of extensive, restrictive and inconsistent Federal regulations. (D–15; D–47)

Double taxation of dividends by the Federal Government has a dampening effect on new investment in the industry and needs to be eliminated. (D–60)

While greater developmental planning is needed in the tourism and travel industry, Federal land-use legislation as currently proposed needs to be avoided. Such land-use legislation could have a severe negative impact on development in the tourism industry.

Federal and State franchise laws need to be simplified to prevent a constraining effect on continued expansion of the lodging industry. (R–22)

The tax burden on the tourism industry needs to be alleviated. Special State and local taxes on the industry have an onerous and dampening effect on new development, and frequently are not channeled back into the tourism industry. Moreover, the complex and fragmented nature of such taxes makes industry planning difficult.

Federal regulatory and development agencies should be required to assess the potential negative impacts of agency rulings and activities on tourism industry development efforts prior to undertaking program activities or enforcing regulatory rulings. (D–55)

In addition, an independent Federal agency needs to review the impacts of such activities on tourism development efforts. (D–59)

Needs involving an increase in program effectiveness

The regulatory or funding review and approval process in a number of Federal agencies whose activities have impacts on tourism development needs to be rationalized and streamlined. Time-consuming bureaucratic procedures have led to costly delays in tourism development projects for applicants to agencies such as the Bureau of Outdoor Recreation, the Economic Development Administration, the Small Business Administration, the Environmental Protection Agency, and the U.S. Army Corps of Engineers. (D–11; D–12)

Professional skills need to be upgraded among some staff of Federal public land agencies with direct responsibility for the planning, development and management of recreational facilities and services on public lands. In some cases, a lack of expertise and experience has caused inefficient development and operation of Federal properties. (D–16)

Needs involving improved coordination or elimination of program duplication

A centralized clearinghouse and coordinating agency needs to be established at the Federal level to coordinate Federal lending and matching-fund activity in the tourism development field by agencies such as the Economic Development Administration, the Small Business Administration, the Bureau of Outdoor Recreation, et ceterea. (D–14; D–44)

Such coordination would be designed to avoid duplication in program activities and increase the efficiency of development programs by integrating their activities into the larger framework of tourism development needs on a local, State, regional and national basis.

Needs involving improved channels of communication and agency responsiveness

More effective channels of communication need to be developed whereby State and local officials and representatives of the private sector of the tourism industry can provide inputs to the formulation of Federal policies and programs on tourism development. This will help to insure that Federal development programs are responsive to the needs of the industry on an ongoing basis. (D–50; D–53)

Channels of communication between Federal development agencies and State and local officials need to be improved to insure that State and local officials have sufficient information on the availability of matching funds for tourism development, the criteria by which such funds are dispensed, the methods for applying for such funds, and other pertinent matters.

INADEQUATE SURFACE AND AIR TRANSPORTATION FACILITIES AND SERVICES

Needs involving a step-up in program commitment or increase in program activity

The Federal Government needs to undertake systematic national transportation planning in coordination with State and local govern-

ments and the private sector to support a development of intermodal transportation systems and greater development of surface mass transportation facilities such as intra- and inter-city railroads. Federal involvement should run the gamut from research to development of a national transportation plan to overall political leadership for such planning. (PR–8; D–38)

Federal officials, at the same time, need to increase their awareness of the interdependent nature and interrelated needs of different transportation modes.

The Federal Government needs to provide more financial and technical support for development of intra- and inter-city surface mass transportation facilities which will directly support tourism activities and will improve access to tourism facilities for segments of the public such as youths and the economically disadvantaged which are not well served by private automobiles. For example, Federal subsidies are needed to stimulate weekend use of municipal buses for urban tourism. (D–17)

The Federal Government needs to step-up funding for Amtrak to support an expansion in operations to provide more frequent service and new service to less visited rural areas. (D–1)

The Federal government neets to increase financial incentives available to the private sector for development of U.S. flag cruise ships. (D–37)

The Federal Government needs to be more aggressive in negotiating bilateral air agreements with foreign governments for aircraft landing rights, fuel charges, and "fifth freedom" rights for ongoing traffic. Frequently, U.S. flag carriers have been shortchanged in such negotiations, in the past, given unequal operating conditions such as foreign government subsidies to foreign national airlines.

Needs involving a refocusing or revision of program objectives or program criteria

Domestic airlines, motorcoach operators, and the railroads need to jointly develop a greater number of innovative travel and tour packages combining different modes of transportation similar to fly/drive packages. (PR–23)

Needs involving elimination or revision of program activities with undesirable impacts

The potential economic impacts of new Federal and State regulatory measures for the transportation industry need to be assessed prior to the implementation of such measures. (PR–30)

The Federal Government needs to undertake partial or total deregulation of the airline industry if such deregulation leads to greater stimulation of domestic travel and more profitable operations by the Nation's airlines. If, on the other hand, partial or total deregulation leads to less profitable airline operation and a loss of air service to smaller communities (with a consequent loss of employment opportunities), such deregulation should be avoided.

The Nation's airlines need to be allowed to mix charter and non-charter passengers on scheduled flights as well as to schedule flights more flexibly in order to increase airline load factors and conserve energy. (PR–56)

The Federal Government needs to increase the number of U.S. cities with direct linkages to major international air routes.

The Federal Government needs to allow a larger number of air carriers to provide air service to smaller cities and isolated cities in the Western States which depend heavily on the airlines to serve their local tourism markets, but presently are served by only one or two major carriers, if any. (D–22)

The Federal Government needs to allow the airlines to make greater use of individual and group incentive fares on domestic flights in order to stimulate off-season travel and make domestic travel as attractive as international travel. At present, it is frequently cheaper for U.S. citizens to vacation abroad than within the United States due to incentive fares permitted for international flights. (PR–56; PR–64)

The Civil Aeronautics Board should strive for a more equitable distribution of airport flight assignments between major airports located in the same metropolitan area.

The Civil Aeronautics Board needs to review the current airline fare structure to realine cost per mile more equitably on the Nation's air routes.

Present Federal noise pollution retrofit regulations for the airline industry need to be revised in order to avoid placing an unreasonable financial burden on the industry. Airline industry executives note that, at present, it is less costly to replace existing aircraft than to modify existing aircraft to conform with the regulations.

The provisions of the mutual aid pact among domestic airlines need to be reviewed; according to representatives of organized labor, the pact has in the past resulted in extended strikes in the industry (D–61).

The Federal Government needs to avoid further deregulation of the railroad industry if the result is a loss of service to small communities and a consequent loss of jobs in the tourism and travel industry.

Amtrak, in setting fares, needs to consider possible negative impacts on employment among other over-the-road carriers if private sector fares cannot remain competitive.

The Federal Government needs to encourage States to eliminate or revise on a uniform basis State regulation of the motorcoach industry which acts as a barrier to efficient interstate bus service responsive to travelers' needs (D–45; D–64).

The 55-mile-per-hour speed limit restriction needs to be made optional for Western States where this restriction has severely damaged transportation access to tourism attractions and facilities in small isolated communities. (D–65)

Proposed legislation establishing a waterway-user charge for all domestic waterway traffic should not be approved without exempting passenger river boats operated as recreational attractions.

Cabotage laws which restrict foreign flag cruise ship traffic in U.S. coastal waterways need to be retained to protect the future potential of the U.S. flag cruise ship industry. (D–9)

Needs involving improved coordination or elimination of duplication

Coordination needs to be stepped-up among the Federal Government, State and local governments, and the private sector in the planning and development of intermodal transportation systems and mass transportation facilities.

Federal public land agencies, State and local governments, and the Department of Transportation need to coordinate activities to insure adequate public access to Federal parklands. (D–30; D–46)

A Federal clearinghouse needs to be established for exchange of information on innovative approaches for solving problems associated with the inadequacies of present surface transportation facilities.

INADEQUATE DEVELOPMENT OF FACILITIES AND SERVICES FOR FOREIGN VISITORS TO THE UNITED STATES

Needs involving a step-up in program commitment or increase in program activity

Federal, State, and local governments need to step-up development of foreign visitor host facilities and services at port-of-entry cities and in the interior of the United States. The United States at present is an "underdeveloped" country in terms of foreign visitor facilitation. (D–3)

The Federal Government should expand the number of designated port-of-entry cities to facilitate the growth of international visitor traffic. (D–2)

Foreign visitor information centers need to be established throughout the country in areas attracting large numbers of foreign visitors. These foreign visitor centers should make available to foreign travelers multilingual informational materials on nationwide travel opportunities as well as local and regional tourism attractions and facilities; and multilingual tourism guides and foreign visitor aides. Such foreign visitor information centers could logically be operated directly through the Federal Government or in conjunction with State and local governments. (D–3)

In addition to foreign visitor centers, both the public and private sectors should support greater dissemination of multilingual informational materials and an expansion of foreign exchange facilities and the number of multilingual guides in small cities and less visited areas in the interior of the United States. Frequently, these are the areas where foreign tourists are in greatest need of tourism information or services tailored to their particular needs.

The Federal Government needs to increase support for an expansion in the use of internationally recognized travel symbols for informational signs in cities, on highways, and at bus, airport, and railroad terminals. (PR–17)

Federal, State, and local programs for the training of multilingual visitor aides and tourism guides should be introduced and/or expanded. One way of supporting programs at the State and city level would be through a Federal matching-fund program.

INADEQUATE PROMOTION OF JOB OPPORTUNITIES IN THE TOURISM AND TRAVEL INDUSTRY

Needs involving a step-up in program commitment or increase in program activity

Federal, State, and local officials need to be better educated concerning the important role played by the tourism and travel industry as a generator of employment opportunities, particularly among less-skilled workers, minority workers, and the unemployed. (R–11; R–23)

The Federal Government needs to step up financial and technical support for job-training programs in the tourism industry for low-skilled and minority workers. For example, greater Federal financial and technical support is needed for the training of low-skilled workers and urban transit personnel as urban tourism guides. The Department of Labor needs to coordinate with labor unions and industry management in developing such programs. (D–39; D–40)

Needs involving a refocusing or revision of program objectives or program criteria

Federal minimum wage restrictions need to be relaxed to permit greater hiring of minority youths, low-skilled workers, and the unemployed by the tourism and travel industry. (D–63)

The Taft-Hartley Act needs to be amended to prevent a new owner of a tourism property from abrogating prior collective bargaining agreements when a tourism property changes ownership. Under the current Federal court interpretation of the "successorship doctrine," such abrogation is possible. (D–62)

Needs involving improved coordination or elimination of program duplication

Better coordination is needed between the Department of Commerce, the Department of Labor, the Treasury Department, and congressional committees on programs designed to stimulate the growth of jobs in the tourism and travel industry. In addition, the Senate Commerce Committee should consult with the Labor and Unemployment Committee during the course of the national tourism policy study. (D–48)

DIFFICULTIES OF SURVIVAL FOR SMALL BUSINESSES

Needs involving a step-up in program commitment or increase in program activity

Financial assistance programs (loans, financial guarantees, grants) of the Economic Development Administration and the Small Business Administration should be expanded to support continued development of small businesses in the tourism industry.

Small businesses in the tourism field need programs providing one-to-one technical assistance from the public sector on such matters as management techniques, financial planning, et cetera. (D–20)

Needs involving a refocusing or revision of program objectives or program criteria

Minimum lending criteria for programs of the Small Business Administration and the Economic Development Administration should be revised downward to permit greater numbers of small businesses to qualify for small-scale loans. (D–19)

Needs involving elimination or revision of program activities with undesirable impacts

Public sector regulation of small business development and operation needs to be made less rigorous and oppressive. Small business owners generally have insufficient financial resources or expertise to deal effectively with the maze of often conflicting Federal and State regulations affecting their operations. In addition, such conflicting regulations often inhibit local commercial banks from making loans to small businesses.

Greater flexibility should be introduced into the implementation of regulations, based on special conditions and local circumstances. At the same time, consistency needs to be maintained in the basic criteria employed in implementing public sector regulation of small businesses.

Congress should limit the scope and objectives of regulatory legislation affecting small businesses in the tourism field to insure that the Congress and not specific Federal agencies will be responsible for any negative impacts of such regulation.

Federal, State, and local ordinances on highway beautification and informational signing need to be revised to permit small tourism businesses to effectively promote their services with the traveling public. While uniformity and aesthetic quality of highway signing are reasonable goals, pursuit of these objectives should not be allowed to detract from the goal of full informational signing on the Nation's highways. In the recent past, small businesses have been severely affected in many local communities by restrictive State highway signing ordinances. (PR–55; PR–13)

The Federal Government should support deployment of more specific travel service information, uniformity of signage throughout the United States, and greater use of international travel symbols. Guidelines should be developed for such signage and State governments should be encouraged or required to establish uniform criteria for enforcement of such guidelines.

Local chambers of commerce need to be permitted to maintain their nonprofit tax-exempt status to allow them to continue working effectively in support of small businesses in the tourism and travel field. (PR–59)

Needs involving an increase in program effectiveness

Public sector regulatory approval procedures for small businesses need to be simplified and made more comprehensible. (D–15)

Application procedures for matching-funds for small business tourism development need to be simplified. Present procedures with agencies such as the Small Business Administration and the Economic Development Administration are time-consuming, costly, and frequently discouraging. (D–11)

CONFLICTING GOALS OF ENVIRONMENTAL PROTECTION AND TOURISM DEVELOPMENT

Needs involving a step-up in program commitment or increase in program activity

All levels of government need to undertake greater coordinated planning based on a full assessment of the short term and long term environmental impacts of tourism development. (PL–3)

Needs involving a refocusing or revision of program objectives of program criteria

The Federal Government needs to establish a clear and coherent policy on balancing the sometimes conflicting goals of environmental protection and tourism development.

Federal agencies supporting or undertaking tourism development need to place greater emphasis on development which enhances rather than degrades the natural resource environment.

This includes public land agencies managing development on federally owned lands as well as agencies providing financial and/or technical assistance to the private sector.

The private sector of the tourism industry needs to recognize environmental limitations on tourism development and plan accordingly for development projects which enhance rather than degrade the environment.

Needs involving elimination or revision of program activities with undesirable impacts

Federal "nondegradation" air quality regulations for some areas are overly restrictive and need to be relaxed to allow carefully planned development of tourism services and facilities which do not significantly pollute the environment. (D–57)

Federal agencies and the Congress should assess the economic impacts of proposed environmental regulations on the tourism and travel industry prior to their promulgation and implementation. (D–55; D–59)

The private sector of the tourism industry needs to represent tourism development interests more effectively in proceedings arising over environmental issues at all levels of government. For example, the industry should emphasize the enhanced quality of life which tourism development can bring about.

Greater flexibility should be introduced into land-use programs designed to conserve natural resources.

Needs involving an increase in program effectiveness

Environmental impact assessment (EIA) procedures should be simplified. At present, such procedures frequently increase the costs of tourism development prohibitively. (D–13)

Needs involving improved coordination or elimination of program duplication

Federal and State agencies whose activities have an impact on the environment (e.g., Environmental Protection Agency, U.S. Army Corps of Engineers, National Park Service, et cetera) need to coordinate their activities with State tourism and conservation groups.

COMPETITION BETWEEN PUBLIC AND PRIVATE SECTOR DEVELOPMENT ON PUBLIC LANDS OR ON ADJACENT AREAS

Needs involving a step-up in program commitment or increase in program activity

Federal and State public land agencies need to undertake greater planning in the development of rural recreational facilities and attractions to insure coordination with private sector development and avoid competition with the private sector for the same tourism revenues.

Needs involving a refocusing or revision of program objectives or program criteria

Federal and State public land agencies should put more emphasis on stimulation of economic benefits for the tourism industry as a criterion in development and management of public resource lands. (D–42)

Federal and State public land agencies need to develop explicit criteria concerning when and where the public sector should intervene to directly develop or manage tourism attractions, services, and facilities on public lands. (D–58)

Such criteria should favor private sector development and management of services and facilities on public lands wherever feasible. (D–28)

The Federal Government should support greater development of private sector commercial resorts on Federal recreation lands (such as lands administered by the U.S. Forest Service and the Bureau of Land Management). (D–18)

Needs involving elimination or revision of program activities with undesirable impacts

Tourism facilities owned and operated by the Federal Government should be managed in ways that avoid unfair competition with private sector facilities. (PR–47)

Regulatory restrictions should be equally applied to public sector and private sector facilities. Public sector facilities should also be required to make payments in lieu of tax in order to equalize the tax burden carried by public and private sector facilities. Federal campgrounds, for example, frequently are required to meet less strict development requirements and do not have the tax burden carried by privately owned campgrounds.

User charges for Federal recreational and tourism facilities should be increased where these are clearly shown to be engendering unfair competition with private sector facilities of equal quality and design on adjacent or nearby property. (D–54)

Public investment in parklands and recreational lands often has a stimulatory effect on private sector investment in the same area. However, greater emphasis should be put on maintaining public parklands through user charges rather than through general tax revenues where a subsidy of public sector facilities is causing unfair competition with the private sector. (D–54)

Federal contractual procedures for private sector (franchise) development of tourism facilities on Federal recreational lands inhibit the financing of such projects; procedures should be revised to make it easier to obtain financing. (R–22)

Needs involving improved coordination or elimination of program duplication

Federal and State programs for development of public lands should be more closely coordinated with private sector development activities to avoid unnecessary competition.

Needs involving improved channels of communication and agency responsiveness

Federal public land agencies need to be more responsive to public testimony by private sector representatives concerning proposed public sector development projects. (D–50; D–51)

Public land agencies at both the Federal and State level need to develop additional mechanisms by which the private sector can provide continuing input to the formulation of public sector policies on public land development. (D–50; D–51)

POPULAR OPPOSITION TO FURTHER TOURISM DEVELOPMENT IN SOME AREAS

Needs involving a step-up in program commitment or increase in program activity

The Federal Government needs to sponsor the development of educational/promotional programs aimed at informing State and local officials and the general public of the social and economic importance of tourism to the Nation. (PR–65)

State and local governments and the private sector similarly need to develop educational/promotional programs aimed at informing local populations of the economic development benefits (jobs, income, public revenues) to be gained from further tourism development on a regional or local basis. (PR–65)

More accurate research needs to be undertaken by State and local governments to better describe the economic and social benefits to be gained from tourism development, including cost/benefit feasibility studies, economic impact studies, studies of the origins of travelers who will make use of planned facilities, and studies of social and quality-of-life benefits associated with tourism. (R–2; R–3; R–5)

Needs involving a refocusing or revision of program objectives or program criteria

State and local governments and the private sector need to undertake planned development of recreational and tourism facilities and services which will serve the needs of local and regional populations as well as tourists from other States and regions. Demonstrating that planned projects will contribute to an improved quality of life for

local populations will help to defuse popular resentment of greater tourism development.

Needs involving improved coordination or elimination of program duplication

State and local governments and the private sector need to step-up coordinated planning of local and regional tourism facilities and attractions development in order to prevent degradation of the environment in local communities which reduces benefits and generates opposition to tourism development.

THE NEGATIVE EFFECTS OF SEASONALITY CYCLES ON THE TOURISM AND TRAVEL INDUSTRY

Needs involving a step-up in program commitment or increase in program activity

Federal, State, and local governments all need to increase promotional activities aimed at stimulating greater off-season travel and tourism to specific regions and localities of the country. (PR–31)

The Federal Government should provide matching-fund grants to States and local governments to assist in implementing promotional programs designed to alleviate seasonal declines in tourism activity.

Federal, State, and local governments need to encourage and support greater development of tourism facilities and services appealing to off-season travelers. Promotional activities alone will be insufficient to overcome seasonality problems. (D–36)

Public sector employees need to be given staggered vacations; this will serve as an example to private sector concerns to consider doing likewise.

Both the Civil Aeronautics Board and the private sector need to support an expansion in the availability of special off-season incentive fares for air transportation to regions experiencing seasonal declines in tourism activity. (PR–56)

Federal, State, and local governments should support the introduction of the all-year school season or staggered school vacations in local school districts around the country. The Federal Government's Monday holiday program should be continued and schools should be encouraged not to begin the fall school season prior to the end of the Labor Day weekend. (PR–26)

Needs involving a refocusing or revision of program objectives or program criteria

The Federal Government should focus international promotion efforts on attracting foreign visitors into regions of the United States experiencing off-season declines in tourism traffic. State and local governments should similarly exert efforts to promote convention activity during off-season periods. (PR–31)

Needs involving a step-up in program commitment or increase in program activity

The Federal Government needs to develop a comprehensive energy policy, encompassing research, planning, development, and promotional aspects of the Nation's energy problem. (PL–9)

Greater Federal support is needed for research aimed at discovering new methods for conserving energy, including methods for transporting individuals with lower per capita energy consumption. In addition, Federal energy agencies should focus greater research efforts on development of alternate sources of energy and development of transportation modes which can utilize such alternate energy forms. (R–13)

Long-range contingency planning by both the public and private sectors is needed to increase the tourism industry's capability for responding flexibly to any new energy emergencies. The Federal Government should direct or coordinate national energy planning to promote the efficient development of domestic energy resources. (PL–4)

Federal policy should support expanded development of alternative forms of mass public transportation, such as railroads and buses. Such an effort must be undertaken in coordination with State and local governments and the private sector. Encouragement should also be given for increased development and production of smaller automobiles consuming less fuel. (D–35)

The Federal Government should push ahead with development of domestic energy resources as quickly as possible, including stepped-up development of Outer Continental Shelf petroleum resources off the Atlantic coastline. (PL–9)

Both the public and private sectors of the tourism industry should jointly encourage greater urban and suburban tourism, as well as greater use of package tours, group travel, and off-season travel to conserve energy. (PR–37)

The public and private sectors should also encourage less energy consumption for commuter travel, in the short term by providing incentives for reductions in per capita consumption, and in the longer term, through developmental planning designed to reduce the overall amount of required commuter travel.

Needs involving a refocusing or revision of program objectives or program criteria

Federal emergency allocation procedures need to be flexibly applied and sensitive to special regional energy needs or patterns of energy consumption. For example, in many Western States, the automobile is a critical means of transportation because of the long distances between centers of population and tourism attractions. While there is a need to distribute the burden of emergency measures over the

entire country, such special regional needs should be given careful consideration in implementing emergency policies. (D–34)

Because of the large percentage of total automobile gasoline consumption accounted for by commuter travel, Federal emergency energy allocation programs should include provisions permitting those who use public transportation for day-to-day commuting to have sufficient gasoline for personal travel on weekends and during vacation periods.

Needs involving elimination or revision of program activities with undesirable impacts

The tourism and travel industry needs to be given an equal priority with other major industries in future Federal emergency energy allocation planning. The tourism industry is willing to accept a fair share of the impacts of energy conservation measures and emergency energy allocation procedures, but Federal policies need to distribute the burden equitably among tourism and other industries. (PR–62)

The weekend closing of gasoline service stations should be avoided. Such closings. would have severe negative impacts on the industry during peak travel days and would critically affect the economic viability of many segments of the industry.

Federal energy agencies should be required to carry out careful studies of the economic impacts of proposed energy policies and programs (such as emergency energy allocation plans) prior to their implementation. (PR–60)

The private sector of the tourism industry needs to mount a greater lobbying and educational effort with Federal energy officials to convince them of the key economic importance of the industry and the need to treat the industry on an equitable basis.

The U.S. Congress needs to have more control over the implementation of emergency energy allocation plans developed by the executive branch.

Needs involving an increase in program effectiveness

The Federal Government needs to establish greater continuity and consistency in its energy policies. In the past, inconsistencies and lack of coordination in Federal energy policies have created confusion and difficulty for the tourism industry in planning effectively for the future. In addition, better advance notice needs to be provided of proposed changes in energy policy if the industry is to have sufficient time to prepare for the impacts of new policies. (PL–9)

Needs involving improved channels of communication and agency responsiveness

Effective channels need to be developed whereby the tourism industry can provide inputs into the formulation of Federal energy policies. One possibility would be to appoint a tourism representative to the National Energy Council (an advisory group to the Federal Energy Administration) and insure that the Council be given a much more meaningful role in assisting to formulate policies than has been done in the past. (PR–62)

INADEQUATE PROMOTION OF THE WIDE RANGE OF TOURISM OPPORTUNITIES, FACILITIES AND SERVICES AVAILABLE IN THE UNITED STATES AND OF THE MEANS FOR TAKING ADVANTAGE OF THEM

Needs involving a step-up in program commitment or increase in program activity

The general public needs to be better educated concerning the tourism attractions and experiences available within the United States. The public is currently not sufficiently aware of the broad range of available national attractions and tourism resources. (PR–34)

Funding for domestic promotional activities on the part of the U.S. Travel Service should be increased as a first step in upgrading the Federal Government's commitment to domestic tourism promotion.

The Federal Government needs to produce and disseminate on a more extensive basis useful information on the full range of tourism opportunities available to all economic levels of the population. The diversity of available tourism experiences should be emphasized to various groups. (PR–34)

In addition, the Federal Government needs to provide State and local governments on request with technical advice on creating travel, promotional, and informational materials which will meet certain uniform criteria for accuracy, usefulness for the consuming public and the like.

The Federal Government should support the development and operation of regional information centers that would provide travelers with information on both regional tourism opportunities and travel destinations and destinations and opportunities outside of the immediate region. One possibility would be to fund such information centers through regional development commissions. State governments should expand development of State tourism information centers as well. (PR–28)

Federal public land agencies need to alleviate problems created by overuse and overcrowding at popular recreational sites by stepping up promotional activities emphasizing the attractions of less-visited, less-well-known recreational sites. The Federal Government needs to work in coordination with State promotion agencies to accomplish this goal.

Needs involving a refocusing or revision of program objectives or program criteria

Federal, State, and local tourism agencies need to focus greater efforts on promoting travel and tourism among the nontraveling segment of the general public. (PR–20)

Such promotional efforts need to be designed to overcome the nontravelers' fears and inhibitions about travel by providing basic information on travel facilities and services and the way to go about utilizing such facilities and services. (PR–43)

Public sector tourism agencies need to be more active in providing promotional information to minorities, the economically disadvantaged, and other groups concerning available tourism opportunities.

Frequently, these segments of the population need public sector promotional assistance the most, because of their lack of access to traditional sources of promotional information. (PR–34; PR–42)

Needs involving elimination or revision of program activities with undesirable impacts

Travelers on the Nation's highways need to be provided with better information on the availability of tourism attractions, facilities, and services. This will require revision of provisions of the Highway Beautification Act and State highway signing ordinances to permit adequate travel service information to be displayed on the Nation's highways. (PR–13; PR–17)

Needs involving an increase in program effectiveness

The Federal Government should introduce a program to educate domestic travel agents about the wide range of travel opportunities in the United States. Such a program could be carried out in a fashion similar to a program administered by Discover America Travel Organization (DATO) designed to acquaint foreign travel agents with U.S. travel opportunities.

The tourism industry needs to promote cities as "total destination packages," emphasizing the availability of varied tourism attractions, shopping, cultural events, and quality services.

Domestic promotional programs need to emphasize the depth and quality of available tourism experiences in such areas as the arts, history, and special events and attractions. (PR–22)

Federal public land agencies such as the National Park Service need to improve the quality and distribution of informational materials concerning public land recreational opportunities. Such material should be more appropriately designed to meet the needs of the traveling public. (PR–10)

Needs involving improved coordination or elimination of program duplication

Domestic tourism promotion by Federal agencies such as the U.S. Travel Service needs to be better coordinated with promotional activities of State and local governments and the private sector.

INADEQUATE PROMOTION OF SPECIFIC REGIONAL, STATE, OR LOCAL TOURISM ATTRACTIONS, SITES, FACILITIES

Needs involving a step-up in program commitment or increase in program activity

The Federal Government needs to institute a matching funds program available to State and local governments for site-specific domestic tourism promotion with a State or local focus. In general, the Federal Government, however, needs to refrain from direct promotion of specific regional, State, and local tourism attractions (excepting, perhaps, Federal parklands and other federally owned and federally managed tourism attractions).[2] (PR–18; PR–19)

[2] A minority of regional meeting participants argued for greater direct Federal promotion of specific tourism sites and attractions.

The Federal Government should step-up technical assistance to States and local communities to assist in identifying and promoting unique local community characteristics as tourism attractions. (PR–24)

Regional development commissions should allocate greater funds for promotion of tourism attractions and facilities on a regional basis. (PR–29)

More effective educational campaigns need to be launched to convince State and local legislators and executive officials of the need for better funding for public sector promotional activities by State and local tourism agencies. At present, promotional budgets of State tourism agencies and city convention or visitors' bureaus are frequently inadequate for effective promotion or for taking advantage of Federal matching funds.

Both the public and private sectors of the tourism industry need to step-up promotion of historical and cultural attractions and develop more imaginative and innovative techniques for educating the general public concerning the existence of such tourism resources. (PR–22)

Needs involving a refocusing or revision of program objectives or program criteria

Federal Government support for State and local promotion of tourism (in the form of either financial or technical assistance) should be channeled into activities which will expand the total tourism market, rather than simply cause competition among States and localities for the same tourism dollar. (PR–47)

The criteria used in allocating Federal matching funds for tourism promotion by States and localities should be flexibly determined on the basis of such factors as a State's or city's population, potential as a tourism market, potential for contributing significantly to expansion in the tourism industry, and need for economic development. Flat grant formulas for all classes of applicants should be revised and/or avoided.

Federal matching funds for tourism promotion should be flexibly allocated in the cases of States and localities with comparatively low tourism budgets which would not normally be able to meet matching-fund requirements. (PR–32)

Needs involving improved coordination or elimination of program duplication

Federal promotional programs which directly or indirectly support specific State or local tourism sites and attractions should be better coordinated with private sector promotional programs to increase effectiveness and insure that promotional efforts expand the total tourism market, rather than induce competition for the same tourism expenditure. (PR–47)

Federal, State, and local governments need to coordinate more effectively the dissemination of State and local site-specific promotional materials on a nationwide basis. (PR–49)

Needs involving improved channels of communication and agency responsiveness

Institutionalized channels need to be developed allowing State and local officials and private sector representatives to provide ongoing inputs in the planning of Federal promotional activities. Federal officials need to be better educated on regional, State, and local tourism promotional needs. (PR–54)

Channels of communication need to be improved between Federal agencies, such as the U.S. Travel Service, and State and local promotional agencies on the availability of Federal financial and technical assistance for tourism promotion and the procedures to be followed in applying for such assistance. (PR–51)

INADEQUATE OVERSEAS PROMOTION OF TRAVEL OPPORTUNITIES IN THE UNITED STATES

Needs involving a step-up in program commitment or increase in program activity

Funding needs to be stepped-up for international promotional activities of the Federal Government in major overseas tourism markets. At present, per capita funding for promotion of foreign visitor traffic is extremely low relative to the funding provided by most other developed nations. (PR–1)

Increased funding should be used to support a larger staff for U.S. Travel Service (USTS) overseas offices, as well as to increase program activities.

Funding needs to be stepped up for joint Federal/State/local promotional programs aimed at the international market. State and local governments would prepare the promotional materials and use Federal Government facilities and programs overseas. The costs would be shared on a matching-funds basis. (PR–2)

The "counterpart funds" law and Public Law 480 should be revised to permit the use of blocked funds for promotion of foreign travel to the United States. (PR–41)

The number of USTS offices overseas needs to be expanded to include representation in additional foreign tourism markets with major potential for generating visitors to the United States (Australia is one example of such a potential market).

International tourism promotion should be accorded a higher priority in overall U.S. international trade and economic policy-making.

The policy commitment to international tourism promotion needs to be stepped-up among overseas offices and personnel of the U.S. Government, including U.S. Information Service personnel and Commerce Department commercial officers in U.S. Embassies. (PR–6)

The Federal Government should encourage and support greater coordinated overseas promotion of travel opportunities in the United States by the private sector of the tourism and travel industry.

The Federal Government needs to undertake negotiations with foreign governments such as Canada for removal of foreign restrictions on the import of U.S.-produced travel promotional materials. (PR–61)

Needs involving a refocusing or revision of program objectives or program criteria

The Federal Government needs to promote greater international visitor traffic to interior regions of the United States in coordination with State and local officials.

The U.S. Information Agency (USIA) needs to put more emphasis on promotion of international tourism in its cultural exchange and informational programs. For example, USIA should include tourism promotional materials in its overseas film program. USIA activities should be less oriented around international political considerations. (PR–40; PR–15)

Needs involving an increase in program effectiveness

International promotional programs of the Federal Government should be oriented toward the general consuming public rather than toward the trade or tour wholesaler segment of the foreign tourism market. (PR–52)

In support of this, more extensive and useful consumer information needs to be provided directly to potential foreign visitors instead of channeling it through tourism trade organizations. (PR–9)

Overseas offices of USTS and USIA need to be situated in locations which are easily accessible to the general public and which do not carry political or diplomatic overtones (i.e., outside of U..S Embassy or consulate grounds). (PR–15)

International promotional efforts need to be targeted more accurately on foreign tourism markets with the greatest growth potential for generating U.S.-bound traffic. (PR–9)

Promotional efforts tied to particular regions of the United States need to be matched with those foreign markets where such regional attractions will generate the greatest interest and appeal. (PR–9)

International promotional programs need to alter the image of the United States as a high-cost travel destination among international travelers. (PR–39)

Production of promotional materials in foreign languages should be increased to improve the effectiveness of international promotion efforts. (PR–9)

Needs involving improved coordination or elimination of program duplication

Federal Government offices and agencies involved in overseas promotion of tourism to the United States need to coordinate programs more effectively to eliminate duplication and insure a uniform promotional policy. (PR–48)

Federal, State, and local governments should coordinate international promotional efforts more effectively, with the Federal Government providing State and local governments with information on foreign markets to assist them in targeting local promotional programs to appeal to foreign visitors. (PR–50)

INADEQUATE FACILITATION OF INTERNATIONAL VISITORS

Needs involving a step-up in program commitment or increase in program activity

The intransit customs clearance program needs to be expanded to other foreign countries besides Canada. In particular, Western European countries and Japan should be considered as candidates for the intransit customs clearance program. (PR–3)

A top-level directive is needed to U.S. consular officials to step-up their commitment to facilitation of international visitor traffic to the United States. (PR–5)

Funding for consular activities of overseas U.S. Embassies and consulates needs to be increased to speed up nonimmigrant visa application-approval procedures. (PR–4)

Needs involving a refocusing or revision of program objectives or program criteria

Facilitation of international visitor traffic needs to be a principal objective of both the Immigration and Naturalization Service and the Bureau of Customs.

Needs involving elimination or revision of program activities with undesirable impacts

Nonimmigrant visa requirements need to be relaxed or eliminated for most foreign visitors from nations granting reciprocal privileges to U.S. citizens traveling abroad. (PR–57)

Training programs for personnel of the Immigration and Naturalization Service and the Bureau of Customs need to stress the need for attitudes and behavior which will facilitate entry by international visitors and leave them with a positive image of the United States. Programs also need to provide greater training in foreign languages. (PR–8)

Needs involving improved coordination or elimination of program duplication

The Bureau of Customs and the Immigration and Naturalization Service need to coordinate scheduling of flight arrivals with the Civil Aeronautics Board and the airlines to facilitate foreign visitor entry. (PR–44)

Federal Government agencies concerned with foreign visitor clearance need to coordinate their activities with local governments to improve conditions for foreign visitors arriving in the United States.

INADEQUATE PROMOTION AMONG FOREIGN ORGANIZATIONS OF POTENTIAL OPPORTUNITIES FOR HOLDING INTERNATIONAL CONVENTIONS, FAIRS AND MEETINGS IN THE UNITED STATES

Needs involving a step-up in program commitment or increase in program activity

The Federal Government needs to take a more active role in promoting international trade fairs and conventions in the United States. Funding should be stepped up for the U.S. Travel Service international promotion program in support of this aim. (PR–27)

The Federal Government needs to provide State and local governments and the private sector with greater Federal assistance in planning, attracting, promoting and operating international trade fairs and cultural events. Possible financial assistance could include direct Federal financial responsibility for some events, loan guarantee programs, matching grants, et cetera. (PR–27)

U.S. representation at international meetings and conferences on travel and tourism needs to be increased and improved as one way of promoting greater numbers of international conventions and meetings in the United States. (PR–7)

Needs involving a refocusing or revision of program objectives or program criteria

To accommodate the funding increases recommended above, the U.S. Travel Service needs to put more explicit emphasis on the promotion of international meetings and events in the United States in its international promotional programs. The U.S. Information Agency needs to do likewise. (PR–27)

Needs involving improved coordination or elimination of program duplication

The Federal Government needs to coordinate more effectively with State tourism agencies and city convention and visitors' bureaus in attracting foreign conventions to the United States. In particular, Federal officials need to work with State and local officials to target promotional programs for local convention facilities with the most appropriate overseas markets. (PR–27)

INADEQUATE NUMBERS OF SKILLED, PROFESSIONAL PERSONNEL IN THE TOURISM AND TRAVEL INDUSTRY

Needs involving a step-up in program commitment or increase in program activity

The Federal Government needs to encourage and support development of educational and career-training programs for the tourism and travel industry. Such support should take the form of both financial and technical assistance to colleges, universities and vocational schools, and could include:

Federal sponsorship of a "visiting scholars" program in which State and local government and private sector travel experts serve as guest lecturers in college-level tourism career-training programs;

Funding of demonstration programs or pilot educational projects to attract continued financial support from private sector sources, and/or State and local governments;

Technical assistance on setting up such career-training programs by public sector tourism experts. (PR–33)

Efforts should be made to improve the prestige accorded to tourism and tourism-related agencies at the Federal, State, and local levels in order to attract greater numbers of qualified and skilled personnel. A top-level commitment by the Federal Government to the tourism

industry, as well as support for educational programs emphasizing the social and economic importance of tourism are both steps which would improve the prestige of tourism activities within the public sector. (PR–65)

Needs involving a refocusing or revision of program objectives or program criteria

Federal, State, and local governments should introduce retraining programs or more effective entry-level training programs for agency personnel involved in tourism matters to improve their responsiveness to tourism needs and their understanding of the dynamics and problems of the tourism and travel industry.

Such career training programs should be accompanied by greater agency commitment to tourism needs and requirements.

Such programs are particularly needed for Federal agencies dealing with tourism facilitation or tourism promotion and development activities, but would be useful as well in agencies with only peripheral involvement or commitment to tourism.

The criteria for making appointments to top-level administrative and leadership positions in public sector tourism agencies should be revised to eliminate political considerations. Tourism agency administrators and staff should be chosen on the basis of training, previous experience in the industry and prestige within the industry. The depoliticization of tourism agencies should be a goal at all levels of government.

Federal, State, and local governments should institute policies aimed at insuring continuity in the staffing of tourism and tourism-related agencies over time.

INADEQUATE CONSUMER PROTECTION FOR THE TOURING OR TRAVELING PUBLIC

Needs involving a step-up in program commitment or increase in program activity

The private sector needs to provide travelers and tourists with more detailed, accurate and reliable consumer information on tourism facilities, services and products to enable consumers to make accurate comparisons among competing products and services and insure that consumers fully understand the nature of such services and products when they choose to make use of them. (PR–35)

Although industry self-regulation is desirable, in several instances Federal and State consumer disclosure requirements may be necessary to insure that consumers do receive adequate information on the costs and quality of the tourism products and services which they purchase. Package tours are a prime example. (PR–25)

Greater Federal Government guidance and support is needed for standardization of State consumer protection regulations. Actual formulation and implementation of such regulations, however, should be left to State governments in most cases.

Federal Government support is needed for development of more effective and responsive legal and institutional mechanisms for consumer redress on travel and tourism complaints and problems. One possibility would be to establish a Federal clearinghouse or "ombudsman-type" office which would receive consumer complaints, and then would either channel them to the appropriate Federal, State, or local officials or would sponsor direct Federal action to support complainants. (PR–36)

Needs involving a refocusing or revision of program objectives or program criteria

Federal and State government efforts to disseminate greater consumer information or provide channels for consumer redress need to be particularly focused on those segments of the public most likely to suffer from poor services or misleading promotion—the inexperienced travelers and the economically disadvantaged.

Needs involving elimination or revision of program activities with undesirable impacts

The Federal Government should not involve itself in developing a nationwide rating scheme for hotels and other tourism accommodations. Industry advertising and ratings developed by private industry associations are sufficient to meet the consumer needs of the traveling public.[3]

---

[3] A small minority of participants at the regional and national meetings supported development of a national quality-rating scheme for tourism accommodations.

CHAPTER V.—PROGRAMMATIC RECOMMENDATIONS BY FEDERAL AGENCY

Chapter IV presented needs for programmatic change to deal with specific issues in the tourism and travel field. Chapter V contains recommendations by participants at the regional and national meetings of the national tourism policy study for programmatic change within specific Federal agencies.

Frequently, these recommendations are centered by implication around a single issue or group of issues because of a Federal agency's involvement in a particular area of tourism and travel. Thus, for example, recommendations for programmatic change within the Environmental Protection Agency (EPA) are associated by implication with the issue of the potential conflict between environmental protection needs and the developmental needs of the tourism industry because of the EPA's focus on matters of the natural, biological and socioeconomic environment.

All of the recommendations in chapter V were either directly or indirectly associated with a specific Federal agency by participants at the regional and national meetings.

In some cases, recommendations may reflect an inadequate understanding on the part of a participant or group of participants concerning the detailed legislated mandates or activities of a particular program or agency. No attempt was made at this point in the NTPS to verify the appropriateness, accuracy or justified nature of each recommendation with the associated Federal agency. Such an effort will be undertaken, however, during subsequent stages of the NTPS. In addition, it should be reiterated that the recommendations contained within this chapter do not necessarily represent the entire universe of opinion concerning required changes in Federal programmatic activities in the tourism and travel field.

Similar to the indexation of programmatic needs in chapter IV, many of the recommendations for programmatic change in this chapter are indexed to responses to specific questions asked in the first part of the followup survey questionnaire sent to participants at the regional and national meetings. The index numbers appear with the recommendations and the responses are detailed in appendix C.[1] In addition, reference may also be made in appendix C to the responses to questions concerning specific Federal agencies asked in the second part of the followup survey questionnaire.

The survey results are supplementary and complementary in nature to the findings developed during the regional and national meetings. The results are useful in assessing the relative importance attached to particular programmatic recommendations by participants at the

[1] R=Research; PL=Planning; D=Development; PR=Promotion.

meetings, but again, the results should be interpreted in the light of the relatively small sample from which they were drawn.

Furthermore, the fact that a recommendation is not indexed to the survey responses should not be taken to imply anything about the relative importance or unimportance of that recommendation; limitations of space in the survey questionnaire as well as the narrow, detailed focus of many of the survey questions preclude a one-to-one correspondence.

The recommendations in chapter V have been grouped according to categories of broad programmatic need under each agency heading in a classification scheme similar to that employed in chapter IV. The agencies or departments included are: the U.S. Travel Service; the U.S. Information Agency; the Bureau of Security and Consular Affairs, Immigration and Naturalization Service/Bureau of Customs; the Bureau of the Census; the Federal Energy Administration; the Bureau of Outdoor Recreation; the National Park Service; the U.S. Forest Service; the Bureau of Land Management; the U.S. Army Corps of Engineers; the Small Business Administration; the Economic Devlopment Administration; the Department of Housing and Urban Development; the Environmental Protection Agency; the Occupational Safety and Health Administration; the Federal Highway Administration; the Civil Aeronautics Board; the National Railroad Passenger Corporation (Amtrak); the Internal Revenue Service; the Office of Facilitation of the Department of Transportation; the Urban Mass Transportation Administration; the Bureau of Indian Affairs; the Bureau of Reclamation; the Federal Maritime Administration; the Federal Trade Commission; the U.S. Post Office; the Department of Commerce; the Department of Health, Education, and Welfare; and the Department of Labor.

U.S. Travel Service (USTS)

GENERAL

Recommendations for stepping up program commitment or increasing program activity

Careful consideration should be given to expanding and broadening the functional role and responsibilities of USTS beyond simply tourism promotion to other aspects of tourism research, planning, and development.

Under such an expanded role, USTS would have broad responsibilities for coordination of travel programs among Federal, State and local agencies, liaison with State and local tourism officials and private sector representatives and implementation of legislated incentives or requirements for prioritizing tourism activites in Federal agencies. USTS would be, in effect, the centralized "voice" of the tourism and travel industry at the Federal level.

USTS would also be made responsible for a national educational effort designed to communicate the full social and economic value of the tourism industry to Federal agencies, State and local government officials, and the general public.

In addition, USTS would have responsibility for developing financial and technical assistance programs to assist State and local tourism agencies and the private sector with research, planning, and development activities.

DOMESTIC PROMOTION PROGRAMS

Recommendations for stepping up program commitment or increasing program activity

USTS needs greater funding to permit an expansion of its domestic promotion programs.

USTS should establish regional and local offices within the United States for domestic promotion of travel and distribution of travel information.

A well-funded USTS matching-funds program to assist States and local areas in domestic promotion should be developed. (PR–2)

Recommendations for refocusing or revising program objectives or program criteria

USTS should promote, on an equitable basis, multistate regions of the United States as travel destinations. Differing opinions were expressed as to whether or not USTS should directly promote specific States, local areas, or sites. (PR–18; PR–19)

USTS needs to grant funds for State and local promotion on the basis of a modified matching-funds formula which will not penalize States with small tourism budgets. The level of funds made available should be flexible, determined on the basis of such factors as a State's or city's size, population, potential as a tourism market, and potential as a contributor to growth of the tourism industry. (PR–32)

USTS should support efforts to reduce seasonality problems by promoting off-season travel to various regions of the country. (PR–31)

USTS should support efforts to conserve energy by encouraging greater use of package tours, group travel, and off-season travel. (PR–37)

USTS should encourage greater development of package and group tours with a particular slant or appeal such as educational tours for particular segments of the private sector.

Recommendations for improving program effectiveness

USTS needs more effective, well-trained and experienced administrative and staff personnel.

Professional versus politically oriented leadership is needed at USTS.

Recommendations for improving channels of communication and agency responsiveness

USTS needs to provide better information to State and local agencies on financial and technical assistance program opportunities and application procedures.

USTS should develop more effective mechanisms for soliciting on an ongoing basis State, local, and private sector input to the formulation of domestic tourism promotional policies and programs.

Recommendations for stepping up program commitment or increasing program activity

The USTS international promotion program needs greater funding to support an increased staff and better facilities. Additional foreign offices should be established in important foreign visitor markets. (PR–1)

USTS matching-funds programs for international promotion in collaboration with State and/or local governments should be expanded and better funded. (This includes programs such as the "Info Road" program in which the cost of foreign operations is shared by the Federal Government and various State governments.) (PR–1)

USTS should encourage travel to U.S. overseas territories as part of its international promotion program.

USTS should step-up efforts to assist in the development of international conventions, trade shows and sporting events in the United States. Greater promotional efforts should be directed at increasing foreign visitor attendance at U.S. professional and "special interest" meetings as well. (PR–27)

Through a revision of the "counterpart funds" law and Public Law 480, USTS should be permitted to use blocked funds for international promotion of travel to the United States. (PR–41)

USTS needs to step-up efforts to encourage international travel on U.S.-flag air carriers; the agency has responsibility for such promotion but efforts have been insufficient. (PR–38)

Recommendations for refocusing or revising program objectives or program criteria

Matching-funds for international tourism promotion should be distributed by USTS to State governments under a different formula which does not penalize States and local areas with low tourism budgets which cannot provide sufficient matching-funds. (PR–32)

Recommendations for increasing program effectiveness

USTS foreign offices need to be relocated to locations which are easily accessible for potential foreign visitors to the United States. (PR–52)

USTS should focus its international promotion of the United States not simply on the "trade" or professional sector of the tourism and travel industry abroad, but also on the general public in foreign nations. Consumer information on travel in the United States should be made directly available to potential foreign visitors. (PR–52)

Foreign journalists should be used by USTS to disseminate information to the general public in foreign nations on the potential of the United States as a tourism destination.

USTS should target its overseas promotional efforts more effectively by matching promotion of particular regions in the United States with appropriate markets overseas. (PR–9)

The USTS international program should provide State and local governments with information on foreign markets to assist them in designing their local programs to appeal to the interests of potential foreign visitors. (PR–51)

USTS should insure that uniform procedures are followed in its overseas offices. (PR–9)

Recommendations for improving coordination or eliminating program duplication

USTS needs to develop a uniform promotion and information policy and better coordination of promotional activities with the U.S. Information Agency and U.S. Information Service as well as other U.S. offices abroad having some responsibility for international visitor promotion. (PR–48)

U.S. Information Agency (USIA)

Recommendations for stepping up program commitment or increasing program activity

U.S. Information Service (USIS) commercial officers in U.S. Embassies abroad need to accord tourism a higher priority. In spite of USIA directives to place greater emphasis on promotion of foreign travel to the United States, officers in several embassies have reportedly failed to respond effectively.

Recommendations for refocusing or revising program objectives or program criteria

USIA should include promotion of foreign visitor travel to the United States as one of the objectives of its overseas film programs. (PR–40)

USIA needs to make available USIA informational materials promoting foreign travel to the United States to States and local areas for use in their domestic promotional campaigns.

Through a revision of the "counterparts fund" law and Public Law 480, USIA should be permitted to use blocked funds for international promotion of travel to the United States. (PR–41)

Recommendations for increasing program effectiveness

USIA operations and procedures should be "depoliticized" to increase the effectiveness of tourism promotion efforts. (PR–9; PR–15)

USIS offices overseas should be located elsewhere than within U.S. Embassies and consulates and should be easily accessible to the general public in foreign nations. (PR–9; PR–15)

Recommendations for improving program coordination or eliminating program duplication

USIA and USIS need to develop better coordination and a uniform promotion policy with the U.S. Travel Service. (PR–48)

Bureau of Security and Consular Affairs/Immigration and Naturalization Service/Bureau of Customs

BUREAU OF SECURITY AND CONSULAR AFFAIRS

Recommendations for refocusing or revising program objectives or program criteria

Nonimmigrant visa requirements should be relaxed or eliminated for most foreign visitors from nations granting reciprocal privileges to U.S. citizens traveling abroad. (PR–57)

Recommendations for increasing program effectiveness

Nonimmigrant visa application procedures need to be further streamlined and the attitudes of overseas U.S. consular officials improved. A top-level directive is needed to U.S. consular officials to better promote and support foreign visitor traffic to the United States.

U.S. Embassies and consulates should be better funded and staffed to increase the efficiency of nonimmigrant visa application approval procedures. (PR–4)

IMMIGRATION AND NATURALIZATION SERVICE AND THE BUREAU OF CUSTOMS

Recommendations for refocusing or revising program objectives or program criteria

The Immigration and Naturalization Service (INS) should make available foreign travel research data collected by INS to public sector officials and private sector representatives of the tourism and travel industry.

Both the Immigration and Naturalization Service and the Bureau of Customs need to include facilitation of international visitation as a primary objective of their programs.

Recommendations for increasing program effectiveness

More efficient and streamlined customs and immigration procedures are needed to facilitate international visitor traffic. Both INS and the Bureau of Customs should plan to adopt new, more automated procedures in the future as the number of foreign visitors to the United States continues to grow.

The Bureau of Customs should expand the intransit customs preclearance program to major foreign tourism markets other than Canada. (PR–3)

Officers of the Bureau of Customs and INS need better training to improve their attitudes and behavior toward foreign visitors undergoing clearance. Officers in both agencies should be less overworked. In addition, both Customs and Immigration officers should have better foreign language capabilities in order to streamline clearance procedures. (PR–8)

Recommendations for improving program coordination or eliminating program duplication

The Bureau of Customs, INS, and the CAB should coordinate more effectively scheduling of flight arrivals and of Customs and

Immigration personnel at airports to facilitate foreign visitor entry. (PR–44)

Recommendations for improving channels of communication and agency responsiveness

The Bureau of Customs and INS should be more responsive to criticism of their activities by State and local governments. In particular, the Bureau of Customs should participate in local programs held by gateway cities to improve conditions for foreign visitors arriving in the United States.

Bureau of the Census

Recommendations for stepping up program commitment or increasing program activity

The Bureau of the Census needs to undertake an annual national travel survey or, at a minimum, an annual update of the national travel survey involving a somewhat more limited scope than the quinquennial survey. (R–1)

The Bureau of the Census needs adequate funds appropriated to allow it to perform such an annually updated national travel survey.

The scope of the national travel survey should be broadened to include collection of more detailed and accurate data of a tourism-specific nature with a State and local focus. This includes greater data on interstate and intercity travel flows; origin and destination of travelers; traveler and nontraveler motivations and personal expenditures by travelers.

Recommendations for improving program coordination or eliminating program duplication

The Bureau of the Census needs to solicit inputs from other Federal agencies involved in tourism concerning their present research activities and their specific needs for additional tourism research data.

Federal Energy Administration (FEA)

Recommendations for stepping up program commitment or increasing program activity

The Federal Energy Administration needs to undertake national energy planning to promote efficient development of domestic energy resources and stimulate greater development and use of alternative forms of transportation to the automobile. (PL–9)

Recommendations for refocusing or revising program objectives or program criteria

FEA must accord the tourism and travel industry equal priority with other major industries in formulating new emergency energy allocation plans and procedures. (PR–62)

Recommendations for increasing program effectiveness

FEA needs to develop greater continuity in its energy policies and programs. The lack of continuity and clarity in FEA policies has had a disruptive impact on long-range planning in the tourism and travel industry. (PR–14)

Recommendations for improving channels of communication or agency responsiveness

FEA should develop effective procedures permitting inputs from the tourism and travel industry prior to the formulation and implementation of Federal energy policies to insure that such policies are sensitive to the needs of the industry. Past efforts to develop such procedures have been of a pro forma nature. (PR–53)

In implementing its energy policies and programs, FEA needs to respond more flexibibly to regional differences in energy usage and energy requirements. (PR–34)

Bureau of Outdoor Recreation (BOR)

Recommendations for stepping up program commitment or increasing program activity

BOR's Land and Water Conservation Fund should be better funded. (D–7)

Recommendations for refocusing or revising program objectives or program criteria

BOR should broaden the scope of its State planning assistance program to require comprehensive tourism development planning as part of State comprehensive outdoor recreation plans (SCORP). Such comprehensive planning might be undertaken in coordination with USTS. (D–6)

The legislation underwriting the Land and Water Conservation Fund needs to be revised to permit States greater flexibility in the use of Land and Water Conservation Fund matching-funds for development projects.

BOR should be encouraged to place less emphasis on rural development and greater emphasis on development of urban outdoor recreational facilities in the allocation of matching-funds under the Land and Water Conservation Fund program. (D–26)

BOR needs to provide greater support for development of recreational facilities specifically designed to stimulate tourism under the Land and Water Conservation Fund program. (D–25)

Recommendations for increasing program effectiveness

BOR procedures for approving applications for matching-funds under the Land and Water Conservation Fund program need to be simplified and streamlined. (D–11)

Recommendations for improving channels of communication and agency responsiveness

Better channels of communication are needed between BOR officials, State officials involved in the SCORP planning process, and public and private sector representatives of the tourism and travel industry.

National Park Service (NPS)

Recommendations for stepping up program commitment or increasing program activity

The National Park Service needs greater funding and additional staff to enable the Agency to develop and maintain adequate visitor

services and facilities within the boundaries of the national parks. (D–6)

Funding should be stepped-up through the National Historic Register for technical assistance to property owners on the proper use of historic properties as sites of public interest and part of our national tourism resource. (D–10)

NPS needs to increase the availability of informational materials on the national parks for States and cities and individual travelers. Information contained in such materials should be better designed to meet the needs of the traveling public. (PR–10)

Recommendations for refocusing or revising program objectives or program criteria

The National Park Service needs to step-up educational and promotional programs designed to encourage more balanced and efficient utilization of national park lands by the public. Efforts should include greater promotion of less popular and less-visited national parks.

NPS needs to at least maintain and preferably increase the level of traveler services and accommodation facilities in the national parks. The policy of limiting facilities development within the boundaries of the national parks should be carefully examined, on a park-by-park basis. Also, the siting of individual facilities within the national parks needs to be improved. (D–56)

In its recommendations for new acquisitions, the National Park Service should attempt to maintain a balance between development of parklands in urban and rural areas. High-density urban area development should not be overly favored.

The National Park Service needs to better satisfy the regional development needs of areas in which it develops and maintains national parklands. Specifically, NPS needs to work closely with the private sector to help the private sector take advantage of development opportunities which are stimulated by public sector investment in national parklands. In addition, National Park Service needs to review the criteria it currently employs in protecting the environmental quality of public lands under its management. (D–31; D–49)

Recommendations for improving channels of communication and agency responsiveness

National Park Service needs to better articulate and communicate its decisionmaking process to State and local officials and representatives of the private sector. (D–51)

U.S. Forest Service

Recommendations for refocusing or revising program objectives or program criteria

The U.S. Forest Service needs to put greater emphasis on development of tourism and recreational attractions and facilities in its

89–959—77——6

multiple-use program for national forest reserves. In the past, Forest Service policy has overemphasized other use aspects such as timber management. (D–56)

Overly restrictive criteria for private sector development of ski and other commercial resort facilities on lands managed by the U.S. Forest Service should be revised and made more flexible. (D–18)

Recommendations for increasing program effectiveness

U.S. Forest Service procedures for planning development of tourism and recreational facilities within national forests need to be simplified and streamlined. Environmental and economic impact analyses carried out as part of this process cause frequent delays in development.

Bureau of Land Management

DEVELOPMENT AND ADMINISTRATION OF NATIONAL RESOURCE LANDS

Recommendations for refocusing or revising program objectives or program criteria

The Bureau of Land Management should support greater private commercial resort development on national resource lands under its management. (D–18)

Recommendations for improving channels of communication or agency responsiveness

The Bureau of Land Management needs to develop better channels of communication with State and local officials and representatives of the private sector. (D–52)

U.S. Army Corps of Engineers

Recommendations for refocusing or revising program objectives or program criteria

The Corps of Engineers in its water-resource development projects (such as those of the lakeshore management program) needs to assign a higher priority to development of tourism and recreational facilities. Frequently, the corps' activities have hindered rather than promoted local recreational development. (D–23)

The Corps of Engineers needs to put more emphasis on environmental protection criteria in its water-resource development projects.

Recommendations for improving program coordination or eliminating program duplication

The Corps of Engineers needs to coordinate its water-resource development planning more effectively with the Environmental Protection Agency and State conservation groups.

Recommendations for improving channels of communication and agency responsiveness

The Corps of Engineers needs to be more responsive to local recreational needs in planning development of water resources under the Agency's control. (D–23)

The Corps of Engineers should publicize public hearings on proposed water-resource development projects more effectively. (D–50)

The Corps of Engineers needs to develop more efficient channels of communication with public officials and private sector representatives at the State and local level. In particular, the corps should be more responsive to requests for accurate information on the administration and interpretation of lakeshore management plans. (D–50)

Small Business Administration (SBA)

Recommendations for refocusing or revising program objectives or program criteria

The lending and grant criteria of SBA financial assistance programs need to be revised to permit a greater number of small businesses in the tourism and travel field to qualify. Current criteria make SBA programs insufficiently responsive to the needs of small businesses in the industry.

SBA needs to provide and/or support programs providing 1-to-1 technical assistance for small business managers in the tourism and travel field in such areas as personnel management, financial management, planning, and so forth. (D–20)

Recommendations for improving program effectiveness

SBA should streamline its approval procedures for financial and technical assistance applications. Current procedures are frequently costly, time consuming, and discouraging.

Economic Development Administration (EDA)

Recommendations for refocusing or revising program objectives or program criteria

While EDA programs have generally had a positive impact on the tourism industry, EDA needs to provide greater support for small businesses in the industry by lowering the minimum investment criterion under which firms may qualify for loans. In the past, investment criteria have been set too high to allow many small businesses to qualify for assistance. (D–19)

Recommendations for improving program coordination or eliminating program duplication

EDA needs to coordinate its financial assistance and development planning activities more closely with private sector representatives to avoid conflicts with private sector activities.

Recommendations for improving channels of communication and agency responsiveness

EDA should solicit inputs from State and local governments for tourism development planning studies which the agency supports or undertakes directly.

Department of Housing and Urban Development (HUD)

COMMUNITY DEVELOPMENT BLOC GRANT ASSISTANCE AND COMPREHENSIVE PLANNING ASSISTANCE

Recommendations for refocusing or revising program objectives or program criteria

HUD policies should permit the use of urban renewal bloc grants specifically for tourism-related projects. (D–33)

Recommendations for eliminating or revising undesirable program impacts or activities

HUD should avoid channeling urban renewal and community development funds into projects which erode rather than enhance the local tax base. Such erosion forces cities to increase lodging and sales taxes with a consequent dampening effect on tourism and travel.

Environmental Protection Agency (EPA)

Recommendations for eliminating or revising undesirable program impacts or activities.

EPA should be required to assess the economic impact of new environmental regulations on the tourism industry prior to their promulgation. Greater weight should be placed on the estimated costs of compliance to the industry in deciding on the feasibility and desirability of such regulations. (D–55)

Specific administrative rulings promulgated by the EPA under the Agency's broad legislated authority should be subject to review and approval by Congress prior to their implementation.

"Nondegradation" air quality standards should be selectively relaxed to allow further development of tourism services and facilities with low potential for polluting the environment in some regions of the country. (D–57)

Recommendations for improving program effectiveness

The EPA needs to streamline its regulatory review procedures to eliminate costly delays in tourism development projects. (D–13)

Occupational Safety and Health Administration (OSHA)

Recommendations for refocusing or revising program objectives or program criteria

OSHA should introduce flexible criteria more responsive to special problems or requirements of the tourism and travel industry and its various segments (for example, lodging) in promulgating and enforcing occupational safety and health regulations.

Recommendations for eliminating or revising undesirable program impacts or activities

OSHA should be required to undertake an assessment study of potential negative impacts of regulations and rulings on development in the tourism industry prior to promulgation of such rulings. (D–55)

Recommendations for improving program effectiveness

OSHA needs to develop greater consistency in its regulatory rulings. Inconsistent rulings in the past have led to confusion and difficulties in planning for the tourism and travel industry.

Recommendations for improving program coordination or eliminating program duplication

OSHA needs to coordinate its regulatory activities more effectively with other Federal regulatory agencies to prevent situations where compliance by the private sector is virtually impossible due to conflicting regulations emanating from OSHA and other agencies. (D–47)

Federal Highway Administration (FHA)

Recommendations for eliminating or revising undesirable program impacts of activities

Restrictive and unevenly enforced aspects of highway signing regulations as interpreted by the Federal Government and the States under the Highway Beautification Act need to be revised. (D–13)

FHA should develop uniform guidelines for standardized informational and directional signs for the Nation's highways which will permit full display of information to meet the needs of both the traveling public and small businesses in the tourism field. (D–55)

FHA should encourage States more effectively to adopt and enforce uniform criteria for highway signing. (D–13)

A top-level directive from within the Department of Transportation is needed to insure the above recommendations are carried out.

Civil Aeronautics Board (CAB)

Recommendations for stepping up program commitment or increasing program activity

The CAB needs to support U.S. airline industry interests more vigorously in negotiations on international agreements for aircraft landing rights, fuel charges, and "fifth freedom" rights for ongoing traffic, et cetera.

Recommendations for refocusing or revising program objectives or program criteria

The CAB should put greater emphasis on the potential positive or negative impacts of regulations on the tourism and travel industry in its administrative rulings process. (PR–30)

Recommendations for eliminating or revising undesirable program impacts or activities

Federal regulation of the airline industry should be revised to stimulate greater domestic travel and more profitable airline operation while avoiding loss of service to smaller communities and consequent losses of employment within the tourism and travel industry. (PR–56)

The CAB should permit the mixing of charter and noncharter passengers on scheduled flights as well as more flexible scheduling of flights in order to increase airline load factors and conserve energy. (PR–56)

The CAB needs to permit greater use of individual and group incentive fares to promote off-season regional travel and greater overall domestic travel and tourism. This will help to alleviate the current situation in which it is frequently cheaper for U.S. citizens to vacation abroad than within the United States due to incentive fares permitted for international flights. (PR–64)

The CAB should strive for a more equitable distribution of airport flight assignments between major airports located in the same metropolitan area.

The CAB should review the current airline fare structure to realine cost per mile more equitable on the Nation's air routes.

Recommendations for improving program effectiveness

The CAB needs to determine more accurately the impact of CAB regulations and rulings on the travel and tourism industry. In particular, the impacts of incremental rulings need to be more accurately determined. (PR–60)

The regulatory procedures of the CAB need to be streamlined; frequently, delays in regulatory decisions have had a negative impact on the airline industry. (PR–12)

Appointments to the CAB should be based on professional ability rather than political considerations.

The CAB should develop greater long term consistency in its regulatory rulings.

Recommendations for improving program coordination or eliminating program duplication

The CAB needs to develop greater overall coordination with other Federal regulatory agencies whose activities have impacts on the tourism and travel industry. (PR–45)

In particular, the CAB should support efforts to coordinate international flight scheduling with the airline industry, the immigration and Naturalization Service, and the Bureau of Customs. (PR–44)

Recommendations for improving channels of communication and agency responsiveness

The CAB should develop more effective mechanisms for insuring tourism industry inputs to the CAB policymaking process.

National Railroad Passenger Corporation (AMTRAK)

Recommendations for stepping up program commitment or increasing program activity

Amtrak needs to be better funded by Congress; in addition, annual appropriations should be assured for a period longer than 1 year to indicate the Federal Government's long term commitment to Amtrak.

Amtrak operations should be expanded to provide service and stimulate greater tourism traffic into less-visited rural areas. (D–1)

Recommendations for refocusing or revising program objectives or program criteria

Amtrak, in setting fares, should consider possible negative impacts on employment among other over-the-road carriers if private sector fares cannot remain competitve.

Internal Revenue Service (IRS)

Recommendations for eliminating or revising undesirable program impacts or activities

Restrictions on allowable income tax deductions for international convention travel should be reviewed by Congress and revised if the negative impact of such restrictions proves significant. (PR–58)

IRS policy aimed at eliminating the nonprofit, tax-exempt status of chambers of commerce and other civic organizations should be revised. (PR–59)

Recommendations for improving program coordination or eliminating program duplication

IRS needs to coordinate more effectively with the Department of Labor and Federal regulatory agencies to reconcile conflicting rules and regulations which make proper compliance impossible and impede development in the tourism industry. (D–47)

Department of Transportation's Office of Facilitation

Recommendations for stepping up program commitment or increasing program activity

The Office of Facilitation should expand efforts—in coordination with the National Park Service, the U.S. Forest Service, and State and local governments—to insure adequate public access to Federal recreational lands and to reduce congestion and overcrowding at the national parks. (D–46)

Urban Mass Transportation Administration (UMTA)

Recommendations for stepping up program commitment or increasing program activity

The Urban Mass Transportation Administration should increase development funding to State and municipal governments for expansion of public bus transportation designed to serve tourism and travel needs. (D–17)

Recommendations for refocusing or revising program objectives or program criteria

The Urban Mass Transportation Administration needs to permit urban transit companies to use UMTA funds for the training of bus drivers and other transit workers as urban tourism guides. (D–46)

Bureau of Indian Affairs

Recommendations for refocusing or revising program objectives or program criteria

The Bureau of Indian Affairs should develop objectives for its development programs associated with tourism which are more realistic and sensitive to local and regional needs. Current programs frequently fail to meet their objectives.

Recommendations for improving program effectiveness

More effective administrative procedures are needed for the development programs of the Bureau of Indian Affairs.

Recommendations for improving channels of communication or agency responsiveness

The Bureau of Indian Affairs needs to develop better channels of communication with State and local governments. At present, State and local officials frequently attempt to circumvent the Bureau because of difficulties in establishing effective communication and coordination.

Bureau of Reclamation

Recommendations for refocusing or revising program objectives or program criteria

The Bureau of Reclamation needs to put greater emphasis on tourism development as a criterion in the planning of irrigation and industrial projects sponsored by the Bureau.

Federal Maritime Administration

Recommendations for stepping up program commitment or increasing program activity

The Federal Maritime Administration needs to undertake better funded, more effective research and development efforts aimed at promoting the growth of U.S.-flag cruise ships.

The Federal Maritime Administration should be better funded to permit the granting of increased financial incentives to the private sector for the development of U.S. cruise ships. (D–37)

Federal Trade Commission (FTC)

Recommendations for improving channels of communication and agency responsiveness

The Federal Trade Commission should develop mechanisms to insure inputs from the tourism and travel industry in formulating agency policies and procedures.

U.S. Post Office

Recommendations for refocusing or revising program objectives or program criteria

The U.S. Post Office should permit State tourism agencies franking privileges in the mailing of educational and promotional materials on State tourism resources, attractions, and services. Such promotional literature serves a genuine educational function.

Department of Commerce

Recommendations for stepping up program commitment or increasing program activity

Commercial and trade development officers of the Department of Commerce stationed in U.S. Embassies and consulates abroad should accord tourism a higher priority in their promotional activities. (PR–6)

Recommendations for improving program coordination or eliminating program duplication

The Department of Commerce needs to establish better intra-agency coordination, as well as better coordination with the Departments of Labor and the Treasury, and relevant congressional committees, in developing programs to stimulate the growth of jobs in the tourism and travel industry. (D–48)

Department of Health, Education, and Welfare (HEW)

Recommendations for stepping up program commitment or increasing program activity

HEW needs to encourage and support development of educational and career training programs for the tourism and travel industry. Such support should include both financial and technical assistance to universities, colleges, and vocational schools for demonstration or pilot projects and ongoing maintenance of such programs.

Recommendations for refocusing or revising program objectives or program criteria

HEW needs to survey the availability of emergency health care services in high-density tourism areas and support expansion of services if necessary. Similarly, HEW should review the availability and quality of water and sanitation facilities at tourism sites and support upgrading where necessary.

Department of Labor

Recommendations for stepping up program commitment or increasing program activity

The Department of Labor should develop in coordination with the private sector of the tourism industry (management and unions) joint Government/industry job-training programs for low-skilled or minority-group workers. (D–39)

Recommendations for refocusing or revising program objectives or program criteria

Department of Labor should support an amendment to the Taft-Hartley Act to specifically require that an employer who assumes ownership or operation of a (tourism) business must honor the terms and conditions of prior collective bargaining agreements.

Recommendations for improving program coordination or eliminating program duplication

The Department of Labor needs to develop greater coordination with the Department of Commerce in formulating and implementing policies and programs with an impact on tourism development, such as the job-training programs suggested above. (D–48)

CHAPTER VI.—SUMMARY RESULTS OF THE FOLLOWUP SURVEY TO THE REGIONAL AND NATIONAL MEETINGS

Introduction

In this chapter, we present a summary analysis of the results of a followup questionnaire survey sent to participants at the regional and national meetings of the National Tourism Policy Study. The survey was designed to accomplish four tasks:

Provide further insight into the views and opinions of regional and national meeting participants on the most important needs and issues facing the tourism and travel industry;

Develop a measure of participants' views on the importance of various needs more statistically reliable than the ranking process undertaken by participants during the regional and national meetings;

Elucidate in a more rigorous fashion participants' views as to the appropriate level of Government and/or the private sector where responsibility should reside for satisfying tourism and travel needs;

Develop more accurate data on the level of awareness and experience of participants with various Federal programs and on sources of dissatisfaction with specific programs.

The survey questionnaire itself was divided into two sections—the first section dealing with issues and needs of the tourism and travel industry which emerged during the regional and national meetings and the second section dealing with specific Federal programs. In the first section, participants were asked to rank 165 research, planning, development and promotional needs of the tourism and travel industry and to indicate where they felt responsibility for meeting the needs should lie—with the Federal Government, regional commissions, State governments, city/local governments, or the private sector.

In developing the first section of the questionnaire, an attempt was made to State needs in essentially the same format as they were developed in the regional and national meetings, in order to minimize bias injected by the NTPS study team analysts in preparing the questionnaire.

In the second section, participants were asked to indicate for 35 Federal tourism-related programs their level of awareness and experience with each program, and their views on the positive or negative impacts of the programs, the levels of the tourism industry most affected by the programs, and the degree and sources of their satisfaction or dissatisfaction with the programs.

The survey questionnaire was sent to 282 regional and national meeting participants. After an initial waiting period, followup telephone calls were made—in some cases several times—to participants

who did not initially return a completed questionnaire. Eventually, 117 completed questionnaires were returned, for a response rate of approximately 41 percent.

Detailed results of the questionnaire responses are provided in appendix C. Responses are broken down into three categories: Total for all participants; national meeting for private sector representatives; and regional meeting for public sector representatives at the State and local levels. Some private sector representatives at the State and local levels were invited to attend the regional meetings. For purposes of analysis, these individuals were reclassified into the national meeting group.[1]

While the results of the questionnaire survey can be read and analyzed independently of the findings of the regional and national meetings, the survey results are basically intended to be supplementary and complementary to the findings of the meetings. They should be viewed as a somewhat more rigorous refinement of the regional and national meeting findings, and as an initial attempt to clarify some of the inherent trade-offs involved in developing policies aimed at satisfying a diverse set of tourism and travel needs.

The summary analysis provided in this chapter is divided into three parts. The first two parts deal with respondents' views on the needs and issues of the tourism and travel industry as expressed in part one of the questionnaire. The third part of the chapter deals with respondents' awareness and opinions of specific Federal programs having a major impact on the tourism and travel industry.

ISSUES AND NEEDS OF THE TOURISM AND TRAVEL INDUSTRY

The most important tourism and travel needs

In the first section of the questionnaire, respondents were first asked to rate 165 tourism and travel needs in terms of their importance for the industry as a whole. The ratings used were (1) "very important," (2) "important," (3) "somewhat important," (4) "not very important," (5) "not at all important."

In analyzing the results, a sliding scale of weighted averages was developed for each of the needs included in the questionnaire. A need which 100 percent of respondents felt was "very important" would have received an average of 1 under this system. If 100 percent of respondents had felt that the need was "not at all important," it would have received a weighted average of 5. If 100 percent of respondents had felt it was "important," the need would have received an average of 2. In the same vein, if 50 percent felt that it was "important" and 50 percent felt that it was only "somewhat important," the weighted average for the need would have been 2.50.

Under this system, the highest ranking need—the "need for national energy planning to promote efficient development of domestic energy resources"—received a weighted average of 1.28—in between "very important" (1) and "important" (2). On the other hand, the lowest ranking need—the "need to revise the 55-mile-per-hour speed limit for intercity buses"—received a weighted average ranking of 4.06 or just slightly less than "not very important" (4).

---

[1] Detailed breakdowns of participant responses by individual regional and national meetings were reviewed during the analysis, but in most cases, the percentage of participants from any given meeting returning completed questionnaires was too small to permit the drawing of statistically reliable conclusions on a regional or industry segment basis.

Table 3 presents the 25 top-ranked needs as rated by survey participants as a whole. They range from the "need for national energy planning" at a weighted average of 1.28 to the "need for a uniform promotion policy and better coordination of promotional activities among USTS, USIA and other agencies and U.S. offices abroad having some responsibility for international visitor promotion" at a weighted average of 1.87.

A brief glance at table 3 will indicate that the major areas of concern among participants are:

Energy constraints on tourism and travel development;

Growth in foreign visitors to the United States;

Expansion and improved quality of tourism and travel research;

Raising of the general priority accorded to tourism and travel by the publicy and private sectors;

Increasing the input of the tourism and travel industry to Government policies and programs on tourism;

Improving coordination and efficiency in Federal programs on tourism; and

Elimination or revision of unnecessary or ineffective Federal regulation of the tourism and travel industry.

In order to analyze the importance of various issues, needs included in the survey questionnaire were classified under the 19 issues discussed in chapter IV. The issues were then assigned a weighted average ranking on the basis of the weighted average for the five top-ranked needs under each issue.

The issues ranking is presented in table 4 and is perhaps a more accurate indicator of the primary focus of participants' concerns. Again, energy concerns predominate, with the rising costs and declining availability of energy in general and petroleum in particular considered the most critical issue for the industry at a weighted average of 1.56. Inadequate overseas promotion is second at 1.74. Inadequate development of tourism attractions, services, and facilities is third at 1.77. Inadequate surface and air transportation facilities and services is fifth at 2.05, and inadequate planning for the industry is sixth at 2.06.[2]

If the 19 issues were ranked in terms of the weighted averages for all the needs assigned under a given issue, the rankings would change slightly due to the fact that some of the issues, such as "inadequate development," contain a much larger number of needs than others.

Overall, of the 165 needs included in the questionnaire, many of the development and promotional needs came out with a less important ranking than research and planning needs. This was somewhat surprising, given the developmental and promotional orientation of many of the participants at the regional and national meetings, and the larger number of development and promotional issues mentioned during the meetings. However, a number of these development and promotional needs were of a fairly specific nature and narrow scope of application. After the most important, industry-wide needs were

[2] "Popular opposition to further tourism development" is fourth at 1.87, but this issue was somewhat overrated because of the broad scope of some of the questionnaire need statements included under this issue.

mentioned by participants at the meetings, they tended to move on to development and promotion needs with a narrower focus, and this is probably a principal reason for the lower average ranking assigned to a number of these needs.

Because many of these needs have a lower ranking, they tend to pull down the overall rankings assigned to issues containing a large number of needs. In issue areas where only a few needs are included, these needs tend to be relatively general and industrywide in application, and as a result, the issue areas receive a relatively higher ranking overall. Thus, it was felt more accurate to rank the issues on the basis of the top five needs only.

TABLE 3.—THE 25 TOP-RANKED TOURISM AND TRAVEL NEEDS

1. Need for national energy planning to promote efficient development of domestic energy resources. (1.28)
2. Need to insure that Federal emergency energy allocation and contingency planning accord the tourism/travel industry equal priority with other major industries. (1.32)
3. Need for mechanism by which representative segments of the industry can provide inputs to development of Federal policies and programs on tourism development on an ongoing basis. (1.58)
4. Need for better funded USTS promotion of the United States in leading foreign tourism markets—for example, Canada, Mexico, Western Europe, Japan. (1.58)
5. Need research for more effective means to conserve energy in the tourism industry—past conservation measures have only shifted travel patterns rather than actually conserving energy. (1.62)
6. Need development of long-range contingency plans for the tourism industry in the face of potential energy shortages, economic recession, and so forth. (1.68)
7. Need for assessment of negative impacts of Federal regulations and rulings on tourism industry development efforts prior to promulgation—that is, need for preparation of a tourism impact statement by Federal agencies. (1.70)
8. Need a higher priority for tourism among State Department offices and commercial officers of the Department of Commerce overseas. (1.70)
9. Need more effective professional promotion by USTS and USIA of the United States as a destination in major foreign visitor markets. (1.71)
10. Need for greater research on the relative costs and benefits of tourism development projects as a means of raising the priority of tourism development in the public eye. (1.72)
11. Need tourism development planning to alleviate the long term negative impacts of rising energy costs on the growth of the domestic tourism and travel industry. (1.74)
12. Need to reconcile conflicting rules and regulations among Federal regulatory agencies which often make proper compliance impossible and have a dampening effect on development of new facilities and services in the tourism/travel industry (for example, Department of Labor and Internal Revenue Service; Federal Energy Administration and Occupational Safety and Health Administration). (1.74)

13. Need for Federal promotional activities to be based on adequate and sound market research. (1.75)
14. Need more extensive quantitative data collection and economic impact studies at the regional, State, and local levels of the tourism industry (including rural and small city areas). (1.77)
15. Need better coordination between Federal agencies involved in tourism promotion and those involved in tourism development. (1.77)
16. Need streamlining of EPA's environmental impact statement review process to reduce delays in tourism facility development. (1.81)
17. Federal energy policies need to provide for regional differences. (1.82)
18. Need assessment of possible negative impacts of Federal regulations and rulings on tourism industry promotional efforts prior to promulgation (for example, licensing of tour brokers, CAB regulations, et cetera). (1.82)
19. Need promotional efforts in foreign tourism markets aimed at altering the image of the United States as an expensive international tourism destination.
20. Need greater coordination between CAB and other regulatory agencies whose activities have an impact on the tourism and travel industry. (1.83)
21. Need to improve training, behavior, and attitudes of U.S. customs and immigration officials to facilitate foreign visitor clearance. (1.84)
22. Federal energy policies should support development of alternative forms of transportation to the automobile (for example, railroads and mass transit). (1.85)
23. Need to insure uniform statistical data collection procedures at the regional, State, and local levels, which would permit nationwide dissemination and sharing of such data. (1.85)
24. Need to establish guidelines for common definitions of tourism terms, standardized methodologies for data collection, and research data categories responsive to tourism research needs. (1.87)
25. Need for a uniform promotion policy and better coordination of promotional activities among USTS, USIA, and other agencies and U.S. offices abroad having some responsibility for international visitor promotion. (1.87)

TABLE 4.—IMPORTANCE RATING FOR THE 19 ISSUE AREAS

1. The rising costs and declining availability of energy in general and petroleum in particular. (1.56)
2. Inadequate overseas promotion of travel opportunities in the United States. (1.74)
3. Inadequate development of tourism attractions, services, and facilities. (1.77)
4. Popular opposition to further tourism development in some areas. (1.87)
5. Inadequate surface and air transportation facilities and services. (2.05)
6. Inadequate planning for site-specific, regional, and national tourism development. (2.06)
7. Inadequate facilitation of international visitors. (2.09)

8. Inadequate research for effective tourism development planning and tourism promotion. (2.13)

9. Inadequate development of facilities and services for foreign visitors in the United States. (2.21)

10. Difficulties of survival for small businesses. (2.24)

11. Conflict between environmental protection goals and tourism development goals. (2.30)

12. The negative effects of seasonality cycles on the tourism and travel industry. (2.34)

13. Inadequate dissemination of information concerning the wide range of tourism opportunities, facilities, and services available in the United States and of the means for taking advantage of them. (2.35)

14. Inadequate promotion of job opportunities in the tourism and travel industry. (2.39)

15. Inadequate promotion among foreign organizations of potential opportunities for holding international conventions, fairs, and meetings in the United States. (2.45)

16. Inadequate numbers of skilled, professional personnel in the tourism and travel industry. (2.46)

17. Inadequate dissemination of information concerning specific regional, State, or local tourism attractions, sites, and facilities. (2.46)

18. Competition between public and private sector development on public lands or on adjacent areas. (2.58)

19. Inadequate consumer protection for the touring or traveling public. (2.80)

Role of government and the private sector in meeting the 25 top-ranked needs

After rating the importance of various needs, respondents were asked to indicate where the responsibility should lie for meeting the individual needs described—with the Federal Government, regional commissions, State government, city/local government, and/or the private sector. Respondents were allowed to choose more than one of these sources in answering the question.

On the average, for the 25 top-ranked needs, 85 percent of participants felt that the Federal Government should have at least some responsibility for meeting specific needs, 9.3 percent felt that regional commissions should share responsibility, 20 percent supported responsibility at the State goverment level, 8.2 percent of respondents argued for city/local responsibility, and 23 percent of respondents supported private sector responsibility.

Among the top 25 needs as ranked by importance, in only two instances did less than 70 percent of the respondents believe that the Federal Government had a legitimate role to play in meeting the needs. In one instance—"the need for greater research on the relative costs and benefits of tourism development projects as a means of raising the priority of tourism development in the public eye"—60 percent of the respondents answered that the Federal Government should assume some of the responsibility for meeting this need. In the other instance—"the need for more extensive quantitative data collection and economic impact studies at the regional, State, and local level"—43 percent of the total respondents felt that the Federal Government should share in the responsibility for meeting the need. Obviously, a

principal reason for the lower percentage in this case was the focus of the need on the State and local level.

In the case of only two of the top 25 needs did more than 20 percent of the respondents support the concept of regional commission responsibility for meeting important tourism and travel needs; 41 percent of respondents felt that regional commissions should be involved in "more extensive quantitative data collection and economic impact studies at the regional, State, and local level"; 26 percent felt that regional commissions should help to "insure uniform statistical data collection procedures at the regional, State, and local levels." Both of these are research needs. Respondents, however, may have responded more to the word "regional" in the need statement than to the concept of regional commission involvement in both these instances. In 18 out of the 25 top-ranked needs, support for regional commission responsibility was less than 15 percent.

In only one of the top 25 needs did 50 percent of more of the respondents argue for State responsibility in meeting the need—68 percent of the total supported State responsibility for "more extensive quantitative data collection at the regional, State, and local levels." In 7 out of 25, the concept of State responsibility was supported by between 27–47 percent of total respondents. Less than 15 percent of respondents supported State responsibility for meeting needs in 11 out of the 25 top-ranked needs.

Support for city or local responsibility for meeting the 25 top-ranked needs was not much higher than for regional commission responsibility. In 17 out of 25 instances, less than 10 percent of respondents felt that cities and local areas should assume responsibility for meeting the need. In six instances, between 11 and 15 percent argued for city/local responsibility. In only two instances did more than 15 percent of participants argue for city/local responsibility—28 percent for "insuring uniform statistical data collection procedures" and 38 percent for more extensive quantitative data collection and economic impact studies at the regional, State, and local levels."

In 24 out of 25 instances, support for private sector responsibility was less than 50 percent. In the case of the "need for a mechanism by which representative segments of the industry can provide inputs to development of Federal policies and programs on tourism development," 50 percent of respondents felt that the private sector should assume and/or share responsibility for meeting this need.

In 11 out of the 25 top-ranked needs, between 26 and 47 percent of respondents argued for private sector responsibility in meeting tourism and travel industry needs. In 8 out of the 25, between 11 and 24 percent of respondents called for private sector responsibility. In the remaining five top-ranked needs, 10 percent or less of respondents called for private sector responsibility.

For the most part, only minor variance occurred between the summary responses of the public and private sector participants at the regional and national meetings. The relative support for different levels of government and the private sector in taking responsibility for meeting particular needs was generally similar, although the actual percentages differed slightly. Where variance occurred, participants tended to emphasize the involvement of the sector they represented in indicating where they believed responsibility for meeting a particular need should reside.

89-959—77——7

The high ranking given to Federal Government involvement and the relatively lesser support for involvement or responsibility at other governmental levels and the private sector should not be taken to imply that participants at the regional and national meetings do not support major involvement by States, cities, the private sector, and/or regional commissions, in meeting the needs of the tourism and travel industry. Fifteen of the 25 most important needs are directly associated, however, with current Federal programmatic activities in tourism and travel. It is not unexpected, therefore, that a large percentage of participants supported some form of Federal involvement in meeting those needs.

Ten of the twenty-five needs, however, are needs which are not specifically associated with current Federal programmatic activities. The high percentage of participants supporting some degree of Federal responsibility in meeting these needs is indicative that participants look to the Federal Government to deal with many of the tourism and travel industry's pressing needs, particulary those needs which are industrywide in scope.

While the questionnaire results do not argue for an exclusive Federal role in meeting these needs, they do indicate a much lesser degree of consensus among participants as to the appropriate roles of States, cities, regional commissions and the private sector in meeting the industry's most pressing needs. Part of this stems from the fact that the needs identified as such are for the most part industrywide and not limited to any single or few geographical or industry sectors.

It should be stressed, however, that these results do not negate the widely supported view that the Federal Government should only involve itself in areas or issues where States, cities, and the private sector cannot find solutions unaided.

DETAILED SUMMARY OF RATINGS ASSOCIATED WITH THE 19 ISSUES

This section contains detailed summaries of the five top-ranked needs [3] associated with each of the 19 principal issues confronting the tourism and travel industry, and the average number of participants supporting involvement on the part of various levels of government and the private sector to meet those needs.

1. The rising costs and declining availability of energy in general and petroleum in particular

The five top-ranked needs under this issue are:

Need for national energy planning to promote efficient development of domestic energy resources (1.28);

Need to insure that Federal emergency energy allocation and contingency planning accord the tourism and travel industry equal priority with other major industries (1.32);

Need research for more effective means to conserve energy in the tourism and travel industry (1.62);

---

[3] In the case of some issues, a total of fewer than five needs is included under the issue.

Need tourism development planning to alleviate the long term negative impacts of rising energy costs on the growth of the domestic tourism and travel industry (1.74);

Federal energy policies need to provide for regional differences (1.82).

The weighted average importance ranking for this issue was 1.56. On the average, 89 percent of respondents supported Federal Government involvement to meet these needs; 13 percent supported regional commission involvement; 25 percent supported State government involvement; 9 percent supported city/local involvement; and 25 percent supported private sector involvement.

2. Inadequate overseas promotion of travel opportunities in the United States

The five top-ranked needs under this issue are:

Need for better funded USTS promotion of the United States in leading foreign tourism markets (for example, Canada, Mexico, Western Europe, Japan) (1.58);

Need a higher priority for tourism among State Department offices and commercial officers of the Department of Commerce overseas (1.70);

Need more effective professional promotion by USTS and USIA of the United States as a destination in major foreign visitor markets (1.71);

Need promotional efforts in foreign tourism markets aimed at altering the image of the United States as an expensive international tourism destination (1.83);

Need for a uniform promotion policy and better coordination of promotional activities among USTS, USIA, and other agencies and U.S. offices abroad having some responsibility for international visitor promotion (1.87).

The weighted average importance ranking for this issue was 1.74. On the average, 91 percent of respondents supported Federal Government involvement to meet these needs; 3 percent supported regional commission involvement; 7 percent supported State government involvement; 2 percent supported city/local involvement; and 16 percent supported private sector involvement.

3. Inadequate development of tourism attractions, services, and facilities

The five top-ranked needs under this issue are:

Need for a mechanism by which representative segments of the industry can provide inputs to development of Federal policies and programs on tourism development on an ongoing basis (1.58);

Need for assessment of negative impacts of Federal regulations and rulings on tourism industry development efforts prior to promulgation (for example, need for preparation of a tourism impact statement by Federal agencies) (1.70);

Need to reconcile conflicting rules and regulations among Federal regulatory agencies which often make proper compliance impossible and have a dampening effect on development of new facilities and services in the tourism/travel industry (for example, Department of Labor and Internal Revenue Service; Federal Energy Administration and Occupational Safety and Health Administration) (1.74);

Need for greater continuity in Federal programs supporting or impacting on tourism development activities (1.87);

Need to rationalize and simplify Federal regulation of tourism facilities development to alleviate difficulties developers experience in obtaining commercial bank loans due to extensive, restrictive, and inconsistent Federal regulations (1.96).

The weighted average importance ranking for this issue was 1.77. On the average, 87 percent of respondents supported Federal Government involvement to meet these needs; 5 percent supported regional commission involvement; 17 percent supported State government involvement; 7 percent supported city/local involvement; and 24 percent supported private sector involvement.

4. Popular opposition to further tourism development in some areas

The four top-ranked needs under this issue are:

Need for greater research on the relative costs and benefits of tourism development projects as a means of raising the priority of tourism development in the public eye (1.72);

Need more extensive quantitative data collection and economic impact studies at the regional, State, and local levels of the tourism industry (including rural and small city areas) (1.77);

Need for more sophisticated research on travel flows from State to State by type of carrier, origin and destination information economic impact factors such as expenditures, employment levels, local and State tax revenues generated by tourism activities, et cetera (1.94);

Need to promote more effectively the quality of life benefits associated with tourism and travel among the general public and Federal, State, and local officials (1.96).

The weighted average importance ranking for this issue was 1.87. On the average, 76 percent of respondents supported Federal Government involvement to meet these needs; 6 percent supported regional commission involvement; 16 percent supported State government involvement; 7 percent supported city/local involvement; and 30 percent supported private sector involvement.

5. Inadequate surface and air transportation facilities and services

The five top-ranked needs under this issue are:

Need to improve training, behavior, and attitudes of U.S. customs and immigration officials to facilitate foreign visitor clearance (1.84);

Need to revise CAB regulations on airline incentive fares, air charters, et cetera, to stimulate greater travel within the United States (1.96);

Need for a National Transportation Policy to encourage development of a nationwide intermodal transporatation system (1.99);

Need greater consideration of impacts on the tourism/travel industry in promulgation of CAB rulings and regulations (2.03);

Need for public land agencies to provide better planned access to public lands for recreational employment by the public (2.43).

The weighted average importance ranking for this issue was 2.05. On the average, 84 percent of respondents supported Federal Government involvement to meet these needs; 6 percent supported regional commission involvement; 12 percent supported State government involvement; 4 percent supported city/local involvement; and 11 percent supported private sector involvement.

6. Inadequate planning for site-specific, regional, and national tourism development

The five top-ranked needs under this issue are:

Need development of long-range contingency plans for the tourism industry in the face of potential energy shortages, economic recession, et cetera (1.68);

Need to clarify approval criteria for matching fund development grants in a number of Federal agencies (1.88);

Need to simplify application and approval procedures for matching development funds in a number of Federal agencies (for example, Bureau of Outdoor Recreation's Land and Water Conservation Fund) (2.02);

Need to expand Amtrak services to less-visited rural areas with tourism and recreation potential (2.25);

Need to provide more favorable Federal investment tax incentives for private sector development of tourism facilities such as lodging and recreational attractions (2.49).

The weighted average importance ranking for this issue was 2.06. On the average, 67 percent of respondents supported Federal Government involvement to meet these needs; 16 percent supported regional commission involvement; 44 percent supported State government involvement; 17 percent supported city/local involvement; and 23 percent supported private sector involvement.

7. Inadequate facilitation of international visitors

The five top-ranked needs under this issue are:

Need to improve training, behavior and attitudes of U.S. customs and immigration officials to facilitate foreign visitor clearance (1.84);

Need for commitment on the part of high Federal officials to improve (through education) the attitudes of Federal, State, and local government employees toward international visitors (1.97);

USTS matching-fund program procedures need to be simplified and easier to understand (2.04);

Need to expand in-transit customs clearance program to major foreign visitor markets (2.13);

Need to eliminate visa requirements for nonimmigrant visitors from major foreign tourism markets granting reciprocal privileges to U.S. citizens (2.15).

The weighted average importance ranking for this issue was 2.09. On the average, 89 percent of respondents supported Federal Government involvement to meet these needs; 3 percent supported regional commission involvement; 8 percent supported State government involvement; 5 percent supported city/local involvement; and 8 percent supported private sector involvement.

8. Inadequate research for effective tourism development planning and tourism promotion

The five top-ranked needs under this issue are:

Need for greater research on the relative costs and benefits of tourism development projects as a means of raising the priority of tourism development in the public eye (1.72);

Need more extensive quantitative data collection and economic impact studies at the regional, State, and local levels of the tourism industry (including rural and small city areas) (1.77);

Need to establish guidelines for common definitions of tourism terms, standardized methodologies for data collection, and research data categories responsive to tourism research needs (1.87);

Need for more sophisticated research on travel flows from State to State by type of carrier, origin and destination information, economic impact factors such as expenditures, employment levels, local and State tax revenues generated by tourism activities, and so forth (1.94).

Need research which is oriented specifically toward developing solutions for the tourism/travel industry's key problems (1.98).

The weighted average importance ranking for this issue was 2.13. On the average, 61 percent of respondents supported Federal Government involvement to meet these needs; 25 percent supported regional commission involvement; 42 percent supported State government involvement; 16 percent supported city/local involvement; and 32 percent supported private sector involvement.

9. Inadequate development of facilities and services for foreign visitors in the United States

The three needs under this issue are:

Need for adoption of uniform information descriptors of tourism facilities on informational signs and for greater use of internationally recognized symbols (1.92);

Need financial and technical support for improvement in foreign visitor port-of-entry facilities, including interpreters and currency exchange facilities; customs and immigration clearance facilities; and foreign language informational materials and services (1.98);

Need to expand the number of federally designated port-of-entry cities (2.96).

The weighted average importance ranking for this issue was 2.21. On the average, 86 percent of respondents supported Federal Government involvement to meet these needs; 8 percent supported regional commission involvement; 25 percent supported State government involvement; 18 percent supported city/local involvement; and 16 percent supported private sector involvement.

10. Difficulties of survival for small businesses

The five top-ranked needs under this issue are:

Need to rationalize and simplify Federal regulation of tourism facilities development to alleviate difficulties developers experience in obtaining commercial bank loans due to extensive, restrictive, and inconsistent Federal regulations (1.96);

Need for intra-agency (Federal Highway Administration) clarification of Highway Beautification Act signing policies and improved administration of program (2.30);

Need to evaluate impact on travel promotion of IRS plan to change tax status of local chambers of commerce and if impact is significant, need to maintain exempt status (2.14);

Need to simplify application and approval procedures for matching development funds in a number of Federal agencies (for example, Bureau of Outdoor Recreation's land and water conservation fund) (2.37);

Need greater support (for example, revision of minimum lending requirements) from the Economic Development Administration for development of small businesses in the tourism industry (2.45).

The weighted average importance ranking for this issue was 2.24. On the average, 84 percent of respondents supported Federal Government involvement to meet these needs; 4 percent supported regional commission involvement; 11 percent supported State government involvement; 5 percent supported city/local involvement; and 15 percent supported private sector involvement.

11. Conflict between environmental protection goals and tourism development goals

The four needs under this issue are:

Need for assessment of negative impacts of Federal regulations and rulings on tourism industry development efforts prior to promulgation (that is, need for preparation of a tourism impact statement by Federal agencies) (1.70);

Need streamlining of EPA's environmental impact statement review process to reduce delays in tourism facility development (1.81);

Need more planning or support for State/local planning of distribution of recreational water resources in water-scarce regions of the United States (2.23);

Need an independent body to review impact of Federal programs on tourism development (2.49).

The weighted average importance ranking for this issue was 2.30. On the average, 76 percent of respondents supported Federal Government involvement to meet these needs; 13 percent supported regional commission involvement; 24 percent supported State government involvement; 10 percent supported city/local involvement; and 26 percent supported private sector involvement.

12. The negative effects of seasonality cycles on the tourism and travel industry

The five top-ranked needs under this issue are:

Need to revise CAB regulations on airline incentive fares, air charters, et cetera, to stimulate greater travel within the United States (1.96);

Need greater promotion of off-season (winter) tourism (2.18);

Need greater development of off-season (winter) tourism facilities/services/attractions (2.36);

Need for greater research into seasonality trends in the industry and possible techniques for alleviating seasonality problems (2.40);

Need support for adoption of uniform local school vacations to coincide with Monday holidays, Labor Day ending of summer travel season, and summer school sessions to alleviate winter off-season problems, et cetera (2.81).

The weighted average importance ranking for this issue was 2.34. On the average, 53 percent of respondents supported Federal Government involvement to meet these needs; 15 percent supported regional commission involvement; 41 percent supported State government involvement; 21 percent supported city/local involvement; and 37 percent supported private sector involvement.

13. Inadequate dissemination of information concerning the wide range of tourism opportunities, facilities, and services available in the United States and of the means for taking advantage of them

The five top-ranked needs under this issue are:

Need for adoption of uniform information descriptors of tourism facilities on informational signs and for greater use of internationally recognized symbols (1.92);

Need for intra-agency (Federal Highway Administration) clarification of Highway Beautification Act signing policies and improved administration of program (2.30);

Need more effective informational programs for visitors to national parks, including more informative printed materials and better distribution of such materials (2.46);

Need for more widespread development of State tourism information centers (2.50);

Need to focus greater promotional efforts on nontravelers versus experienced travelers (2.58).

The weighted average importance ranking for this issue was 2.35. On the average, 65 percent of respondents supported Federal Government involvement to meet these needs; 10 percent supported regional commission involvement; 40 percent supported State government involvement; 10 percent supported city/local involvement; and 19 percent supported private sector involvement.

14. Inadequate promotion of job opportunities in the tourism and travel industry

The five top-ranked needs under this issue are:

Need for greater coordination between the Department of Labor and the Department of Commerce in formulating and implementing tourism development policies and programs (1.97);

Need better and more accurate research on the future capital requirements of the tourism/travel industry and the relationship between capital investment and generation of jobs (2.02);

Need better research on the relative costs of job creation in the tourism industry versus other industries (for example, costs of job training, required capital investment, et cetera) (2.30);

Need to revise minimum wage restrictions which prevent greater hiring of unskilled youths and minority workers by the tourism/travel industry (2.81);

Need for joint Department of Labor/industry management/labor union development of job-training programs for the tourism industry among low-skilled workers, minorities, et cetera (for example, job training as tourism hosts and guides, et cetera) (2.85).

The weighted average importance ranking for this issue was 2.39. On the average, 73 percent of respondents supported Federal Government involvement to meet these needs; 9 percent supported regional commission involvement; 26 percent supported State government involvement; 6 percent supported city/local involvement; and 29 percent supported private sector involvement.

15. Inadequate promotion among foreign organizations of potential opportunities for holding international conventions, fairs, and meetings in the United States

The two needs under this issue are:

Need for greater U.S. representation at international meetings on tourism promotion and development (2.12);

Need for greater promotion of international fairs and sporting events in the United States (2.77).

The weighted average importance ranking for this issue was 2.45. On the average, 73 percent of respondents supported Federal Government involvement to meet these needs; 10 percent supported regional

commission involvement; 23 percent supported State government involvement; 13 percent supported city/local involvement; and 32 percent supported private sector involvement.

16. Inadequate numbers of skilled, professional personnel in the tourism and travel industry

The one need under this issue is:

Need for greater development of educational and career training programs in the tourism and travel field in technical schools, colleges, and universities (2.46).

The weighted average importance ranking for this issue was 2.46. On the average, 48 percent of respondents supported Federal Government involvement to meet the need; 21 percent supported regional commission involvement; 57 percent supported State government involvement; 32 percent supported city/local involvement; and 49 percent supported private sector involvement.

17. Inadequate dissemination of information concerning specific regional, State, or local tourism attractions

The five top-ranked needs under this issue are:

Need for mechanism by which representative segments of the industry can provide inputs to development of Federal policies and programs on tourism promotion on an ongoing basis (for example, labor unions providing inputs to USTS) (2.12);

Need better channels of communication between USTS and State promotional agencies (particularly with respect to preparation and approval of technical assistance proposals) (2.31);

Need a more equitable system for allocating Federal matching funds for State/local domestic and international promotional programs which will not penalize States and regions with small tourism budgets (2.55);

Need for greater promotion of "national heritage" and "historical" attractions (2.61);

Need for technical assistance to local communities to help in promoting unique local characteristics (2.71).

The weighted average importance ranking for this issue was 2.46. On the average, 62 percent of respondents supported Federal Government involvement to meet these needs; 13 percent supported regional commission involvement; 41 percent supported State government involvement; 21 percent supported city/local involvement; and 19 percent supported private sector involvement.

18. Competition between public and private sector development on public lands or on adjacent areas

The five top-ranked needs under this issue are:

Need to better coordinate Federal site-specific promotional programs with private sector promotional programs to insure an expansion of the total tourism market rather than simply competition for the same tourism dollar expenditure (1.74);

Need to develop specific and explicit criteria as to when and where Federal agencies should intervene to directly develop/manage tourism resources/attractions (2.54);

Need for Federal public land agencies to adopt maximization of economic benefits for the tourism industry as a leading criterion in development and management of Federal resource lands (2.78);

Need for Federal Government support for greater private commercial resort development on Federal recreation lands (including National Park Service, U.S. Forest Service, Bureau of Land Management) (2.91);

Need greater Government financial and technical support for private sector development efforts (2.92).

The weighted average importance ranking for this issue was 2.58. On the average, 76 percent of respondents supported Federal Government involvement to meet these needs; 6 percent supported regional commission involvement; 16 percent supported State government involvement; 7 percent supported city/local involvement; and 30 percent supported private sector involvement.

19. Inadequate consumer protection for the touring and/or traveling public

The three needs under this issue are:

Need more detailed, accurate, and reliable consumer information in travel promotion materials in the public and private sector (for example, cost breakdown on tour packages, et cetera) (2.70);

Need development of more effective and responsive legal and institutional mechanisms for consumer redress on travel/tourism complaints and problems (2.85);

Need licensing of retail travel agents, travel wholesalers, and tour brokers to insure professional promotion of travel opportunities (2.86).

The weighted average importance ranking for this issue was 2.80. On the average, 42 percent of respondents supported Federal Government involvement to meet these needs; 4 percent supported regional commission involvement; 35 percent supported State government involvement; 11 percent supported city/local involvement; and 39 percent supported private sector involvement.

FEDERAL PROGRAMS RELATED TO TOURISM AND TRAVEL

In the second part of the questionnaire survey, participants were asked to indicate, for 35 Federal tourism-related programs in 25 different agencies or departments, their level of awareness and experience with each program, and their views on the positive or negative impacts of the programs, the levels of the tourism industry most affected by the programs, and the degree and sources of their satisfaction or dissatisfaction with the programs. Only those respondents who were aware

and had experience with specific programs were asked to comment on the nature of the programs' impacts and the levels of and reasons for satisfaction or dissatisfaction.

The 35 Federal programs are listed in table 5.

Level of awareness and experience with programs

Respondents were asked to indicate whether they were aware or not aware of individual programs. The average level of awareness among all respondents was a surprisingly high 76 percent. The level of awareness registered through the followup questionnaire was probably somewhat higher than would have been registered had the questionnaire been distributed prior to the regional and national meetings. Many participants indicated that the regional and national meetings had been an educational experience as far as developing a new awareness of specific Federal programs and program opportunities.

The top five agency programs in terms of participants' awareness were:

National Railroad Passenger Corporation (Amtrak) (95 percent awareness);

Federal Energy Administration—Energy conservation and rationing programs (93 percent awareness);

Federal Highway Administration—Highway beautification program (93 percent awareness);

National Park Service—Operation of the National Park System (91 percent awareness);

Occupational Safety and Health Administration (90 percent awareness).

By comparison, programs of the U.S. Travel Service were 9th and 10th respectively in terms of level of awareness with an 86 percent awareness response, following the Federal Aid Highway program of the Federal Highway Administration (89 percent); the Civil Aeronautics Board (87 percent); and the Small Business Administration (87 percent).

TABLE 5.—THE 35 TOURISM-RELATED FEDERAL PROGRAMS INCLUDED IN THE SURVEY

1A. U.S. Travel Service—Domestic travel promotion within the United States.
1B. U.S. Travel Service—Foreign travel promotion to the United States.
2A. U.S. Information Agency—Educational and cultural exchange programs.
2B. U.S. Information Agency—Information support for U.S. tourism programs abroad.
3A. Immigration and Naturalization Service and Bureau of Security and Consular Affairs—Administration of immigration laws and clearance of foreign visitors.
3B. Immigration and Naturalization Service and Bureau of Security and Consular Affairs—Screening and processing of visa applications.
4. Bureau of the Census—National travel survey.

5. Federal Energy Administration—Energy conservation and rationing programs.

6A. Bureau of Outdoor Recreation—Nationwide outdoor recreation plan.

6B. Bureau of Outdoor Recreation—Land and water conservation fund.

7A. National Park Service—Operation of the National Park System.

7B. National Park Service—National register of historic places.

7C. National Park Service—Administration of private concessions in national parks.

8A. U.S. Forest Service—National forest system recreation program.

8B. U.S. Forest Service—U.S. Forest Service research program.

9. Bureau of Land Management—Development and administration of national resource lands.

10. U.S. Forest Service/National Park Service/Bureau of Land Management/et cetera—National wilderness preservation system.

11. Department of Agriculture—Cooperative State research service.

12. U.S. Army Corps of Engineers—Development and operation of multipurpose water resource projects and facilities.

13. Small Business Administration—Development assistance to small businesses.

14. Economic Development Administration—Development assistance to underdeveloped areas.

15. Community planning and development—Community development bloc grant assistance and comprehensive planning assistance.

16. Department of Agriculture/Land-Grant Universities—Extension Service.

17A. Environmental Protection Agency—Air and waste management programs.

17B. Environmental Protection Agency—Water and hazardous materials programs.

17C. Environmental Protection Agency—Environmental impact statement process.

18. Occupational Safety and Health Administration—Regulation of occupational safety and health conditions.

19. Interstate Commerce Commission—Regulation of interstate surface transportation.

20A. Federal Highway Administration—Federal aid highway program.

20B. Federal Highway Administration—Highway beautification program.

21. Federal Aviation Administration—Airport planning and development programs.

22. Civil Aeronautics Board—Promotion and regulation of the U.S. air transport industry.

23. National Railroad Passenger Corporation (Amtrak)—Amtrak.

24. Internal Revenue Service—Corporate and individual deductions for conventions and other travel.

25. Federal Trade Commission—Promotion of fair competition in interstate commerce and consumer protection.

The five agency programs with the lowest level of participant awareness were:

The U.S. Forest Service research program (35 percent awareness);

The Department of Agriculture—Cooperative State research service (37 percent awareness);

The Department of Agriculture/land-grant universities—Extension Service (44 percent awareness);

The Bureau of Land Management (56 percent awareness);

The U.S. Information Agency—Information support for U.S. tourism programs abroad (59 percent awareness).

Participants who were aware of programs were asked to indicate whether or not they "had experience" with the program. Among those respondents who were aware of specific Federal programs, the percentage of participants with experience with an individual program ranged widely, from a high of 68 percent for the Federal Energy Administration to a low of 9 percent for the cooperative State research service of the Department of Agriculture. The average percentage of participants with experience with the 35 programs in 25 agencies was only 37.5 percent, however.

The five programs with which participants overall had the greatest experience were:

Federal Energy Administration—Energy conservation and rationing programs (68 percent);

National Railroad Passenger Corporation (Amtrak) (65 percent);

U.S. Travel Service—International promotional programs (62 percent);

Internal Revenue Service—Corporate and individual deductions for conventions and other travel (56 percent);

Bureau of the Census—National travel survey (56 percent).

The five Federal programs with which participants overall had the least experience were:

The Department of Agriculture—Cooperative State research service (9 percent);

The U.S. Forest Service research program (11 percent);

The Bureau of Land Management (14 percent);

The Department of Agriculture—Extension Service (16 percent);

The Department of Housing and Urban Development—Community planning and development programs (21%).

Nature of Federal program impacts

Respondents who had both awareness of and experience with programs were asked to indicate whether they felt that individual programs had "made a positive impact", "a negative impact", or "little or no impact at all" * * * "on the tourism industry as a whole."

The percentage of respondents who felt that individual programs had had a positive impact on the tourism industry as a whole ranged from a high of 53 percent for the international promotional programs of the U.S. Travel Service to a low of 8 percent for both the visa

application procedures of the Bureau of Security and Consular Affairs and the Cooperative State Research Service (CSRS) of the Department of Agriculture.

Similarly, the percentage of respondents who felt that individual programs had had a negative impact on the tourism industry as a whole ranged from a high of 49 percent for the energy conservation and rationing programs of the Federal Energy Administration to zero percent for four programs—the U.S. Information Agency international tourism promotion support program, the U.S. Forest Service Research program, the Bureau of Land Management's Administration of National Resource Lands, and the Department of Agriculture's Cooperative State Research Service.

However, it is misleading to compare figures for positive or negative impact categories in isolation, since a large percentage of respondents in the case of each program registered no opinion because of lack of awareness or experience. On average, 61.5 percent of respondents registered no opinion with respect to the nature of program impacts. In the case of the Cooperative State Research Service, for example, which only 8 percent of respondents felt had had a positive impact on the industry, 91 percent registered no opinion and, as mentioned above, no respondent felt that the CSRS had had a negative impact on the industry. Moreover, many programs receiving a large positive impact rating had offsetting negative impacts attributed to them, and vice-versa.

A more accurate way to compare positive and negative impacts of programs is through a simple index formulated by subtracting the percentage of respondents which felt a program had negative impacts from the percentage of respondents who felt that a program had positive impacts. On this basis, the five highest ranking programs in terms of net positive impacts were:

U.S. Travel Service—International Promotion Programs (+51.0 percent);

National Park Service—Operation of the National Park System (+48.0 percent);

National Park Service—Register of historic places (+41.0 percent);

Federal Highway Administration—Federal aid highway system (+34.0 percent);

Bureau of the Census—National travel survey (+32.0 percent);

On the other hand, the five lowest ranking programs in terms of *net* positive impacts were:

Federal Energy Administration—Energy conservation and rationing programs (−34.0 percent);

Occupational Safety and Health Administration (−17.0 percent);

Environmental Protection Agency—environmental impact statement process (−15.0 percent);

Immigration and Naturalization Service—Administration of immigration laws and clearance of foreign visitors (—14.0 percent);

Bureau of security and consular affairs—Screening and processing of visa applications (—12.0 percent).

Areas or segments of the industry most affected by programs

Respondents with both awareness and experience with programs were asked to indicate which area or segment of the tourism industry was most affected by an individual program—regional/State level, city/local level, or private sector level. Respondents were permitted to select more than one level in answering the question.

Among the 35 individual Federal programs, an average of 25 percent of respondents felt that the regional and State levels were most affected by individual programs, 20 percent felt that city and local levels were most affected, and 23 percent felt that the private sector was most affected. Again, a large percentage—an average of 68 percent—of all participants in the survey expressed no opinion because of a lack of awareness or experience.

The five Federal programs receiving the largest percentage of participant support as having their greatest impacts at the regional and State levels were:

Federal Energy Administration—Energy conservation and allocation (46 percent);

National Park Service—Operation of the National Park System (46 percent);

National Railroad Passenger Corporation (Amtrak) (45 percent);

U.S. Travel Service—International promotional programs (44 percent);

Bureau of the Census—National travel survey (44 percent).

The five programs receiving the largest percentage of participants support as having their greatest impacts at the city and local levels were:

Federal Energy Administration—Energy conservation and allocation programs (44 percent);

National Railroad Passenger Corporation (Amtrak) (39 percent);

National Park Service—National Register of Historic Places (36 percent);

Environmental Protection Agency—Environmental impact statement process (31 percent);

Federal Highway Administration—Highway beautification program (28 percent).

The five Federal programs receiving the largest percentage of participant support as having their greatest impacts at the private sector level were felt to be:

U.S. Travel Service—International promotional programs (38 percent);

Environmental Protection Agency—Environmental impact statement process (38 percent);

National Passenger Railroad Corporation (Amtrak) (38 percent);

Internal Revenue Service—Corporate and individual deductions for conventions and other travel (38 percent);

Bureau of the Census—National travel survey (36 percent).

Degree of satisfaction with Federal programs

Respondents with both awareness and experience with Federal programs were asked to indicate their level of satisfaction with the programs (for example, very satisfied, somewhat satisfied, or not satisfied).

Among the 35 Federal programs surveyed, an average of only 9 percent of respondents claimed that they were very satisfied with individual Federal programs as they are currently structured. An average of 16 percent responded that they were somewhat satisfied with current individual programs, while an average of 12 percent claimed that they were not satisfied with current programs. On the average, 63 percent of respondents had no opinion due to lack of awareness or experience.

Participants most frequently claimed they were very satisfied with the following 10 programs in descending order of satisfaction:

National Park Service—Operation of the national park system (26 percent);

U.S. Forest Service—National forest system recreation program (18 percent);

National Park Service—National register of historic places (17 percent);

Federal Highway Administration—Federal aid highway program (17 percent);

Bureau of Outdoor Recreation—Land and Water Conservation Fund (14 percent);

U.S. Forest Service/National Park Service/Bureau of Land Management—National Wilderness Preservation System (14 percent);

Federal Highway Administration—Highway beautification program (14 percent);

Federal Aviation Administration—Airport planning and development programs (13 percent);

U.S. Travel Service—International promotional programs (13 percent);

Bureau of the Census—National travel survey (12 percent).

When very satisfied and somewhat satisfied responses are combined, a somewhat different grouping of Federal programs emerges. Participants claimed most frequently that they were either very satisfied

or somewhat satisfied with the following 10 programs in descending order of satisfaction:

U.S. Travel Service—International promotional programs (51 percent);

National Park Service—Operation of the national park system (47 percent);

National Park Service—National register of historic places (43 percent);

Bureau of the Census—National travel survey (43 percent);

National Railroad Passenger Corporation (AMTRAK) (36 percent);

U.S. Travel Service—Domestic promotional programs (35 percent);

Federal Highway Administration—Federal aid highway program (32 percent);

Civil Aeronautics Board (32 percent);

U.S. Forest Service—National Forest system recreation program (30 percent);

Federal Aviation Administration—Airport planning and development programs (30 percent).

However, several of these programs are included among the 10 with which participants most frequently claimed they were not satisfied:

Federal Energy Administration—Energy conservation and rationing programs (50 percent);

National Railroad Passenger Corporation (Amtrak) (29 percent):

Environmental Protection Agency—Environment impact statement process (28) percent;

Occupational Safety and Health Administration (25 percent);

Internal Revenue Service—Corporate and individual deductions for conventions and other travel (25 percent);

Immigration and Naturalization Service—Administration of immigration laws and clearance of foreign visitors (21 percent);

U.S. Travel Service—Domestic promotional programs (20 percent);

Federal Highway Administration—Highway beautification program (20 percent);

Civil Aeronautics Board (20 percent);

Bureau of Security and Consular Affairs—Screening and processing of visa applications (18 percent).

Sources of dissatisfaction with Federal programs

Respondents who were either only somewhat satisfied or were not satisfied with Federal programs were asked to write in their reasons

for dissatisfaction with specific Federal programs. Participants' open-ended responses were classified into 13 groups:

Negative impact on the economy;
Discourages competition;
Insufficiency of current Federal commitment;
Ill-designed program objectives;
Unnecessary or undesirable impacts of Federal program activities;
Inefficient administration of current programs;
Poor coordination of program;
Poor channels of communication;
Programs are too costly;
Studies need to be conducted more frequently;
Program activities should be left to private enterprise;
Other answers; and
Don't know/no answer.

For the 35 programs as a whole, the following were the most frequently cited sources of dissatisfaction:

Inefficient administration of current programs (cited for 28 programs by an average of 25 percent of respondents);[4]

Ill-designed program objectives which fail to address important needs of the industry (cited for 19 programs by an average of 16 percent of respondents);[5]

Insufficiency of current Federal commitment (cited for 12 programs by an average of 16 percent of respondents;[6]

Unnecessary or undesirable impacts of Federal program activities (cited for eight programs by an average of 16 percent of respondents);[7]

Poor channels of communication (cited for seven programs by an average of 12 percent of respondents);[8]

Other answers (cited for five programs by an average of 16 percent of respondents);[9]

Poor coordination of program (cited for three programs by an average of 11 percent of respondents).[10]

---

[4] The numbers of these programs as listed in table 5 are: 1A, 1B, 2A, 2B, 3A, 3B, 4, 6A, 7A, 7B, 7C, 8A, 9, 10, 12, 13, 14, 15, 17A, 17B, 17C, 18, 19, 20B, 21, 22, 23, 25.
[5] The numbers of these programs as listed in table 5 are: 2B, 3B, 5, 6A, 6B, 7A, 7C, 8A, 8B, 9, 10, 12, 13, 15, 16, 19, 20B, 21, 24.
[6] The numbers of these programs as listed in table 5 are: 1A, 1B, 6B, 7A, 7B, 11, 13, 14, 15, 16, 10, 12.
[7] The numbers of these programs as listed in table 5 are: 3B, 5, 8A, 10, 17A, 17C, 20B, 24.
[8] The numbers of these programs as listed in table 5 are: 1B, 6B, 7C, 8A, 11, 12, 20B.
[9] The numbers of these programs as listed in table 5 are: 8B, 9, 10, 11.
[10] The numbers of these programs as listed in table 5 are: 2B, 8A, 10.

Appendix A

Lists of Needs and Recommendations by Regional and National Meeting

Boston Regional Meeting (Team One)

NEEDS AND RECOMMENDATIONS

1. There is a clear need for a stronger voice for tourism at the Federal level. The tourism and travel industry needs a tourism agency of Cabinet-level status which will ensure that government officials at all levels understand better the importance of tourism and travel and are more responsive to the needs and interests of the tourism and travel industry. (100 points)

2. The priority accorded to travel and tourism in policy-making at the Federal, state and local level needs to be increased through means such as the National Tourism Policy Study and subsequent legislation arising from the Study, involvement of tourism industry leaders more actively in the political process, and the establishment of an industry review process for Federal appointments in the tourism field similar to that undertaken by members of the legal profession with respect to judgeships. (90 points)

3. The public image of the tourism and travel industry needs to be improved and opposition to tourism promotion and development among private citizens, members of the Federal Government, and environmental groups needs to be overcome.

4. The Federal Government needs to assist the tourism and travel industry in alleviating problems of seasonality. The Government should provide matching funds to state and local jurisdictions which have programs designed to reduce seasonality (e.g., Massachusetts promotes travel for the elderly during the spring and fall off-seasons). The Civil Aeronautics Board should support the development of domestic air fare incentives to balance seasonality peaks on a regional basis. In addition, the Federal Government should encourage research programs designed to establish criteria for "seasonality" grants and develop further program ideas for reducing the impact of seasonality trends on the industry. (90 points)

5. The Federal Government should increase its support for domestic travel promotion efforts in the United States, but it should clarify its own role in such promotion programs. (90 points)

6. Federal matching-fund programs for tourism promotion at the regional, state and local levels should be expanded and the level of available funding increased. While the Federal Government can appropriately provide financial and technical assistance, program initiative should be left to individual states and local areas. (90 points)

7. The criteria presently used in the U.S. Travel Service (USTS) matching-fund promotion program for states and cities should be revised. The level of funds made available to individual grantees should be flexibly determined on the basis of such factors as a state's or city's size, population, potential as a tourism market and potential as a contributor to growth of the tourism industry rather than simply on the basis of a flat grant formula for all applicants. (90 points)

8. The U.S. Travel Service should expand its promotion of international conventions in the United States and foreign visitor attendance at U.S. professional and "special interest" meetings. Use of the United States Information Agency offices overseas for such promotion should be contingent on improving United States Information Service staffing and professional orientation toward tourism. (90 points)

9. Non-immigrant visa requirements should be eliminated for foreign visitors from nations granting reciprocal privileges to U.S. citizens traveling abroad. (90 points)

10. The United States needs to develop better means and facilities for providing services to foreign visitors in the United States. This includes foreign language informational materials and interpreter services, foreign exchange facilities, and

research to develop better ways to relate information on U.S. attractions to incoming visitors. (90 points)

11. Funding for U.S. Travel Service overseas promotion programs should be increased. If the USTS budget for overseas promotion on a per capita basis was similar to that of Canada's, the budget would be over $200 million per year rather than the current $7 or $8 million. In addition, the USTS "Info Road" program—in which the cost of overseas promotional offices is shared by the Federal Government and various state governments—should be expanded. (90 points)

12. Federal financial and technical support to city governments for development of tourism and urban recreational facilities should be expanded. (90 points)

13. Professional leadership for Federal tourism and travel programs needs to be improved and expanded. Programs for professional training in the tourism industry should be expanded at colleges and universities, but even more important, appointments to key tourism positions in the Federal Government should be filled by recognized industry leaders. (80 points)

14. The Federal Government should undertake more vigorous research programs aimed at establishing accurately the economic importance of tourism and travel. In support of this goal, the Bureau of the Census should perform a National Travel Survey more frequently than every five years. Such data on the economic importance of tourism will support state and city tourism officials in obtaining budgetary approval. (80 points)

15. The accuracy of research surveys in the tourism and travel field needs to be improved. During the Bicentennial period, for example, predictions of visitor arrivals in excess of hotel accommodations in some cities led visitors to cancel their planned visits. (80 points)

16. The Federal Government should assist in developing standardized definitions for research terms and categories and uniform methodologies for tourism and travel research. (80 points)

17. The Federal Government should undertake all appropriate measures to alleviate the problem of urban crime. Urban crime frequently has a serious negative impact on tourism growth in cities. (80 points)

18. Border relations between the United States and Canada and the United States and Mexico need to be improved to facilitate international visitor flows. (70 points)

19. The Federal Government should take a more active role in promoting world fairs and international trade expositions in the United States. (60 points)

20. Channels of communication between Federal agencies administering development and promotion programs and state and local officials need to be improved. Federal officials need to be better educated concerning the relationship between city governments and local convention and visitors' bureaus. (50 points)

21. Regional, state and local economic development commissions need to establish higher priorities for tourism development in their programs. In the past, the activities of such commissions have frequently hindered rather than promoted tourism facilities development. (50 points)

22. The frequent turnover of personnel in state tourism agencies needs to be halted. Appointments to state tourism agencies should be made on the basis of professional skill rather than political influence. (50 points)

23. Federal, state and local officials need to ensure that the tourism and travel industry receives an equitable share of natural and economic resources—relative to its economic and social importance as an industry—in governmental planning for industrial development, promotion of commerce, energy conservation, and environmental protection. (50 points)

24. The positive and negative aspects of the national tourism policies and programs of Canada and Mexico should be analyzed during the National Tourism Policy Study. (50 points)

25. Amtrak services should be expanded to additional presently unserved areas. (50 points)

Boston Regional Meeting (Team Two)

NEEDS AND RECOMMENDATIONS

1. Greater support for the tourism and travel industry needs to be developed among state executive officials and legislators. Such support will only be forthcoming when government officials are convinced of the economic importance of tourism for state and local economies. The toursim and travel industry needs to develop a comparative list of different states' funding commitments to tourism

to use in lobbying state officials for greater appropriations. In addition, State Governor's Council Meetings and Governor's Associations in Washington, D.C., should be lobbied to make them more responsive to industry needs. (92 points)

2. There is a critical need to improve channels of communication between Federal agencies administering tourism-related programs and state and local tourism representatives in both the public and private sector. (92 points)

3. Both the public and private sectors of the tourism and travel industry need greater information about existing Federal programs and how they function. The Federal Government should provide a listing of available programs which is easily accessible and continuously updated. The list should be designed in such a way that state and local officials can easily grasp the scope, significance, and applicability of Federal policies/programs to their own areas and responsibilities. (88 points)

4. The U.S. Congress (as well as the Executive Branch) needs to be fully educated concerning the important impact that tourism and travel have on the U.S. economy and the well-being of the U.S. population. (88 points)

5. Federal efforts to promote foreign visitor travel to the United States should be stepped up. The U.S. Travel Service (USTS) should provide funds and coordination for state/city/regional promotional campaigns for international travel. State and local officials would design the campaigns in coordination with USTS and would share USTS facilities overseas and participate "piggy-back" fashion in USTS overseas promotional programs. (84 points)

6. USTS funding should be increased to permit an expansion of domestic and international promotional programs. In addition, the effectiveness of USTS procedures and personnel should be improved. (80 points)

7. The promotional budget of the Discover America Travel Organization (DATO) should be substantially increased. (80 points)

8. The Federal Government should support more economic research studies of the impact of tourism and travel on the economy as an aid to the industry in gaining more support from government officials. These economic impact studies should be focused on the level of a particular region, state or local area in order to maximize their usefulness for state and local officials. (80 points)

9. Federal matching funds for tourism development need to be stepped up if they are to be sufficient to meet the tourism and travel industry's needs. In addition, the criteria by which such funds are distributed should be more flexible and responsive to the industry's needs; and the availability of information concerning funding criteria, opportunities, requirements, etc., should be improved. (80 points)

10. The Federal Government needs to support development of educational and career-training programs in the tourism and travel field. The Government should coordinate a program for travel education at the college/university level in which travel experts from state and local governments are invited as guest lecturers at colleges and universities around the country. (76 points)

11. The economic importance of tourism and travel should be clearly recognized by Federal energy officials and the industry should receive equitable treatment in the formulation of a National Energy Policy and emergency energy allocation procedures by the Government. (76 points)

12. The Federal Government should partially subsidize official travel on U.S. airlines undertaken by state and local tourism officials to promote travel in the United States (domestic travel agents in the private sector receive a discount from domestic air carriers for such travel). (76 points)

13. Federal officials need to increase their understanding and appreciation of state and local problems in the tourism and travel field. In particular, Federal agency officials frequently do not have a good grasp of the needs of smaller cities and rural areas or needs in other fields than tourism promotion.

In support of this, internal coordination and channels of communication should be improved between national and regional offices of Federal tourism agencies, particularly within the Department of Commerce. Also, procedures similar to the regional meetings of the National Tourism Policy Study should be institutionalized to ensure in the future that state and local officials are consulted before policies are implemented (i.e., before formal Congressional Hearings or promulgation of Agency rulings). (72 points)

14. Federal loan guarantees for tourism development projects should be made available on a widespread basis. (72 points)

15. Federal support is needed for making information on tourism opportunities available more readily to consumers. (72 points)

16. The Federal Government should support the standardization of definitions of tourism and travel research terms and the criteria by which different research methodologies are employed. (68 points)

17. State and local officials need better information on promotion and research activities being carried out by Federal agencies. A marketing approach to disseminating information on Federal programs should be adopted. Printed information should be simplified and presented in a "commercialized" style which will attract the attention of state and local officials and facilitate their understanding of the material. Staff with a marketing background should be added to Federal agencies involved in such liaison activities. Federal agencies should undertake participation in travel shows and conferences set up by the private sector or by state and local promotional agencies; such agencies should also make full use of regional offices for educating state and local officials on Federal program activity. (60 points)

18. Present Civil Aeronautics Board (CAB) regulation of the airline industry should be revised to promote greater domestic tourism growth. Too frequently such regulation has a dampening, rather than stimulating, effect on travel and tourism. (60 points)

19. Greater Federal financial and technical support is needed for tourism promotion and development in the private sector of the tourism and travel industry. At present, sectors outside of travel promotion (travel agents, tour wholesalers, etc.) receive little effective Federal assistance. (56 points)

20. Appointments to leading positions in Federal agencies involved in tourism-related activities should be made on the basis of professional skills and experience rather than political connections. (56 points)

21. Further research and education of Federal officials is required to ensure that Federal officials involved in tourism promotion and development have an accurate understanding of tourist and traveler motivations and psychology. (52 points)

22. The Federal Government needs to establish a clear policy on balancing the sometimes conflicting goals of environmental protection and tourism development. Properly focused attempts to protect the environment can support further development of tourism, but fragmented or short-sighted policies aimed at environmental protection can have a strong negative impact on growth of the tourism and travel industry (e.g., airport noise curfews). (52 points)

24. The Federal Government should coordinate more effectively with state and local tourism officials in planning and scheduling of Federal "fan" tours. (44 points)

Boston Regional Meeting (Team Three)

needs and recommendations

1. State and local governments and, in some cases, private industry need funding assistance through matching or direct grants for tourism promotion and operation of facilities that support the national interest (i.e., Regional Information Centers that aid travelers with information on destinations outside of the jursidiction of the Center operator, etc.). (90 points)

2. A National Tourism Policy should provide guidance to Regional Commissions on their role in tourism: specifically, it should call for a fixed percentage of their economic development budgets to be set aside for tourism programs. (90 points)

3. The U.S. Travel Service (USTS) budget should be increased to cover any new programs resulting from a new National Tourism Policy so that existing programs in other Federal agencies can be continued without increasing existing funding levels. (87 points)

4. A program of education and communication is needed to broaden the understanding of Federal legislative and administrative leaders, state and local political leaders, and the general public, concerning the socio-economic and employment impacts of the tourism and travel industry on local areas. As part of the program, coordination must become the responsibility of one agency that can define a useful form for travel statistics (i.e., tourism specific, in a form useful to the users, on a state and regional basis, etc.); assign specific data collection responsibility to other appropriate agencies (i.e., USTS, Bureau of the Census, Department of Labor, Department of Transportation, etc.); establish more frequent surveys; and assemble and organize data from other agencies for data users. (83 points)

5. USTS should have responsibility for domestic promotion of travel in the United States on a nationwide basis. The Agency should also promote travel to multi-state regions on an equitable basis. (83 points)

6. Federal policies need to consider the economic, employment and tax revenue impacts of Federal actions on local areas. (80 points)

7. State and local governments and private industry need Federal assistance in attracting, planning, promoting and operating international trade fairs and cultural events. Such assistance should include direct Federal financial responsibility for the events, or loan guarantee programs, matching grants, etc. (73 points)

8. USTS should continue its role in international tourism promotion, but should focus its promotion of travel to the United States not only on the "trade" or professional sector of the industry abroad, but also on the general public in foreign nations. (73 points)

9. State and local governments and private industry need to have better information as to how Federal agencies, other than USTS, spend tourism-related funds. In addition, these other tourism-related programs need to be centrally coordinated so that guidance can be provided to eliminate inefficiencies and conflicts and to encourage multi-agency funding of programs to better focus the Federal involvement. (70 points)

10. The USTS international program should provide state and local governments with information on foreign markets to assist them in targeting their local promotional programs on the interests of potential foreign visitors. (70 points)

11. State and local governments need Federal guidance to create uniform travel promotion information. (70 points)

12. U.S. domestic tourism promotion by Federal agencies needs to be coordinated with state and local governments as well as private industry. (53 points)

13. A single Federal agency needs to be designed to collect tourism statistics from state and local entities to be aggregated for national use. (50 points)

14. The Federal Government should promote the growth of the tourism industry as it does manufacturing industries in its economic and employment stimulation programs. (50 points)

15. The Federal Government needs to provide a mechanism for better utilization and coordination of multi-jurisdictional projects and programs among various Federal agencies involved in tourism. (47 points)

16. State and local governments need Federal guidance on methodologies that should be used for the collection and use of economic, employment and other data related to tourism. (40 points)

17. USTS should have regional and local offices within the United States for U.S. travel promotion and distribution of travel information. (40 points)

18. USTS should promote international events in the United States such as trade fairs and conventions. (37 points)

19. The Federal Government should better support state and local agencies participating in international promotional programs aimed at attracting foreign visitors to specific regions, states or localities within the United States. The Government should subsidize part of the high cost of printing promotional materials with a local focus, should do a better job of targeting potential overseas markets to reduce waste and inefficiency in such programs, and should encourage and coordinate state and local efforts to jointly sponsor the preparation of promotional literature with a regional focus for distribution overseas. (33 points)

20. The Federal Government needs to develop coordinating mechanisms to assist states in sharing statistical research data. (27 points)

21. USTS needs some regulatory powers to develop influence with the tourism and travel industry. (27 points)

22. The Federal Government needs to develop uniform descriptors of tourism facilities (such as hotel quality ratings) to protect consumers and enable them to make informed choices among alternative available travel services. (20 points)

23. USTS should research how other countries develop and manage national tourism programs. (15 points)

24. USTS needs to target its overseas promotional efforts more effectively (i.e., to match promotion of a particular part of the United States with the most appropriate market overseas). (10 points)

25. USTS needs a more rationally planned approach to the use of promotional materials. (10 points)

26. A National Tourism Policy needs to provide for consumer protection (i.e., package tour standards to enable travelers to accurately compare package tours, hidden extra-cost-item disclosure, etc.). (10 points)

Washington Regional Meeting (Team 1)

NEEDS AND RECOMMENDATIONS

1. The priority accorded to tourism at all levels of government needs to be raised through education of Federal, state and local officials, as well as the general public, concerning the economic and social importance of tourism and travel for the United States. (95 points)

2. Civil Aeronautics Board (CAB) regulations need to be reviewed and revised to improve the quality of domestic air service and stimulate greater air travel. The present regulatory structure has failed to maximize either the quality of service or the potential growth in travel by air. (90 points)

3. The tourism industry needs to develop innovative strategies for convincing government officials of the importance of tourism. State legislators are frequently unresponsive to the simple argument that the tourism and travel industry is a major economic stimulant. Tourism industry proponents have yet to find the "right formula" for convincing state officials of this fact. (88 points)

4. The Federal Government should assist the tourism industry to alleviate the negative impact of seasonal trends. The Government should support local school districts which undertake year-round schooling pilot projects to spread out vacation demand. Federal employees should be given staggered vacations, and the Government should support expansion of the four-day work week in the private sector. The CAB should encourage greater use of incentive air fares to attract off-season travelers. Finally, the Government should provide matching-funds for state and local programs designed to reduce seasonality. (88 points)

5. Greater coordination is needed of tourism planning activities at all levels of government and in the private sector. (88 points)

6. The tourism industry and the Federal Government need to develop strategies to deal with the negative impact of rising fuel costs and declining fuel availability in the near future. Rail and bus service should be expanded, and tourism marketing programs should be adjusted to stimulate greater use of rail and bus service over the private automobile. The CAB should permit airlines to adjust their schedules to maximize load factors and thus reduce excessive fuel use. Urban and suburban recreation should be encouraged. Finally, the Federal Government should encourage states and local governments to consider the energy situation in their planning and development programs. (85 points)

7. Both the Federal Government and state governments need to better coordinate their planning and development of rural resource attractions (such as national and state parks) with the private sector prior to development. Institutional procedures should be developed to ensure private sector input to the process of planning both attractions and accompanying services. (83 points)

8. The Federal Government should provide more financial support to state and local governments and local nonprofit groups to develop local tourist, historical and cultural attractions. In general, it is preferable that such development funding should be in the form of bloc grants rather than matching-funds. Federal bloc grants permit greater state and local discretionary spending, and state and local entities are generally better positioned to determine state and local development needs. (83 points)

9. Application procedures for Federal matching-funds in such agencies as the U.S. Travel Service (USTS) should be simplified. Complex procedures are a particular problem at the local government level where channels of communication with Federal agencies are frequently insufficient. (80 points)

10. The tourism and travel industry needs to be recognized as an essential industry in development of Federal emergency energy allocation systems. The importance of the industry should be recognized as well in Federal long-term energy planning. (80 points)

11. The Federal Government should support rather than compete with the private sector in development of tourism attractions and services on public lands. Wherever possible, facilities and services should be under private sector management. Moreover, publicly-owned services and facilities should be operated in such a way that they do not compete unfairly with adjacent privately-owned facilities. In addition, the Federal Government should support private sector tourism development with the same financial incentives and benefits it grants to the manufacturing sector, including low-interest loans and investment tax credits. Finally, Federally-sponsored feasibility studies of potential tourism development projects should be made available to the private sector.

12. Local government officials need to be better informed on methods for obtaining Federal financial and technical assistance from agencies such as the Economic Development Administration. The Federal Government should sponsor training seminars for state and local tourism officials on the structure and operation of Federal agencies and tourism programs. (75 points)

13. Greater planning is needed by Federal and state agencies in the development of rural recreational attractions. The development of surrounding service facilities should be coordinated with attractions development, competition with private sector facilities should be avoided, and careful feasibility studies should be carried out prior to the commitment of funds. (75 points)

14. More accurate and extensive planning of tourism development projects is needed. (75 points)

15. Procedures need to be institutionalized for making available on a continuing basis information on Federal program opportunities. USTS could serve as a coordinating clearinghouse for the dissemination of information on research, planning, development and promotion programs. An alternative would be to establish such a clearinghouse program in a private agency such as Discover America Travel Organization (DATO). Training seminars explaining the Federal Government's role in tourism should be expanded by such private organizations as DATO. (75 points)

16. Applications for Federal technical and financial assistance in the tourism field should be channeled through a central coordinating agency. This would simplify the application process for state and local officials and would eliminate the problem of dealing with a number of different Federal agencies. (75 points)

17. Popular opposition to expanded tourism development in some areas and localities needs to be overcome through carefully-planned development as well as through education of local populations concerning the economic benefits of tourism activity and social benefits of tourism activity. (75 points)

18. Better direct channels of communication and support are needed between Federal agencies with tourism-related programs and local governments. Because Federal program assistance to local governments is frequently channeled through state governments, local municipalities experience frequent difficulties in representing their interests adequately with Federal agencies. (73 points)

19. The tourism industry needs Federal support and coordination in developing common research terms and methodologies in the tourism and travel field. (73 points)

20. Federal, state and local governments need to coordinate research efforts more effectively to aid in development of a common data base for the tourism industry. In addition, public sector efforts at all levels need to be better coordinated with private sector research. (68 points)

21. Coordinated planning by all levels of government is required in the tourism and travel field in order to balance environmental preservation needs and such needs as economic growth and energy resource development. (65 points)

22. The U.S. Government should negotiate with the Canadian government for the removal of Canadian barriers to the import of U.S.-produced travel promotion literature. (65 points)

23. Federal tourism programs should support and complement rather than compete with state and local tourism programs. Federal policies and programs should be revised where they are in conflict with state and local program objectives. In addition, an important objective of Federal programs should be an increase in the effectiveness of state and local programs. (65 points)

24. State and local governments should refrain from increasing occupancy or lodging taxes as an "easy" solution to the need for greater government revenues. Added to rapidly rising sales and other specialized taxes, increased occupancy taxes may have a serious negative impact on the tourism business. (63 points)

25. Tourists and travelers need to be dispersed into less-developed, less popular areas to alleviate problems of oversaturation and overdevelopment of popular tourist sites. In addition to promoting travel to such less-developed area, however, the public sector must support proper planning and development of attractions and facilities to attract travelers. (63 points)

26. The Federal Government, in coordination with state and local tourism officials, needs to promote greater travel by foreign visitors into specific states, regions, and local areas in the interior of the United States. (63 points)

28. The tourism and travel industry needs more imaginative development and promotion of natural heritage and historical attractions. (63 points)

29. There is a need to promote greater "week-end" travel into less-developed regions of the United States. (60 points)

Washington Regional Meeting (Team Two)

NEEDS AND RECOMMENDATIONS

1. The Federal Government needs to establish an authoritative sources for uniform "official" definitions of tourism terminology to be used by all Federal agencies and other data sources. Simple, clear and specific terms need to be developed that will allow statistical separation of business, recreation and tourism travel. Definitions need to recognize regional differences. (100 points)

2. The Federal Government should establish a single source for tourism industry statistics (i.e., employment, economic, tax revenue, etc.). (100 points)

3. The tourism industry needs to be recognized as an important contributor to the national economy, especially by Federal agencies. (96 points)

4. New Federal programs designed to create employment opportunities should include the tourism industry. The industry is a major employer of low-skill, minority and teenage labor. These groups, with the highest unemployment rates in the United States, could benefit substantially from stimulation of job opportunities in the tourism industry. (90 points)

5. A national education effort is needed to communicate the value of the tourism and travel industry in terms of jobs and economic growth to Federal agencies, state legislators, and the general public. The U.S. Travel Service (USTS) should be the vehicle for the educational program within the Federal Government, and USTS offices should be made more accessible to the public. A Federal coordinating council should be established to initiate and execute joint projects between different Federal agencies.

In support of this effort, the credibility of tourism research data should be improved, and the Federal Government should provide information targeted to educate state governments. The positive aspects of tourism should be emphasized (e.g., non-polluting development improved quality of life, growth compatible with environmental protect on through good land-use planning, etc.). Finally, states need to clearly identify their tourism needs and on the basis of those needs, develop goals for state tourism policies and programs. (88 points)

6. USTS or some other primary Federal tourism agency needs more influence within the Federal Government. (88 points)

7. The tourism and travel industry needs to communicate to the general public the significance of the industry's contribution to local economies. (86 points)

8. The positive quality-of-life characteristics of tourism need to be emphasized to the strongly environmental-protectionist segment of the public to overcome their anti-tourism sentiments. (86 points)

9. The tourism industry needs more reliable and believable industry data to points the benefits of tourism. (84 points)

10. The Federal Government needs to provide support for public transportation development to conserve energy and improve access to tourism and recreational destinations for sectors of the public such as youths and the economically-disadvantaged which are not served well by private autos. This effort should include a Federal clearinghouse for exchange of ideas on the subject (e.g., Philadelphia Cultural Loop Bus, etc.) (82 points)

11. Federal funds for tourism should place more emphasis on tourism development and less on tourism promotion. (80 points)

12. Federal revenue-sharing and other pass-through funding programs should specifically include tourism as an acceptable use of funds if the program goals are (a) economic development, (b) employment stimulation, (c) non-pollutive development, or (d) improved quality of life. (78 points)

13. A National Tourism Policy should assign a clearinghouse function to one Federal agency to coordinate Federal policies and eliminate program contradictions. (78 points)

14. Tourism development efforts should be better designed to contribute to the quality of life. (76 points)

15. USTS in its matching funds program for tourism promotion needs to recognize that not all states have a large enough budget to participate in this program. Existing and future Federal matching funds programs for tourism planning, development or promotion should be on a formula basis to allow states with low tourism budgets to participate. (76 points)

16. Federal matching funds programs for highway development should be related to the percentage of traffic attributable to out-of-state travelers using highways within each state. (66 points)

17. The Bureau of Outdoor Recreation should require consideration of tourism as a part of the State Comprehensive Outdoor Recreation Plan (SCORP) program. (66 points)

18. USTS should promote tourism as a preferable alternative to vacationing at home. (66 points)

19. The Federal Government should relax domestic air charter regulations to stimulate greater air travel. (60 points)

20. The Federal Government needs to equalize air fares (price per mile) between cities. (58 points)

21. The National Historic Register needs to provide more guidance to property owners on the use of historic properties as sites of public interest and part of our national tourism resources. (56 points)

22. USTS funds should not be used for localized promotion of tourism. (54 points)

23. Federal airline flight assisgnment need to be more equitably distributed in areas having more than one airport (e.g., Baltimore Washington International/ Dulles). (54 points)

24. Federal tax policy regarding foundations needs to be reviewed. Recent changes in policy have shifted the cost of some public attractions from tax payers to users, making these cultural attractions inaccessible to low-income segments of the public. (46 points)

25. The Federal Government needs to provide funds for the operation of state travel information centers. (44 points)

26. The Federal Government should regulate or guide state regulation of the motorcoach industry to achieve national uniformity. (44 points)

27. USTS should promote site-specific tourism. (42 points)

Atlanta Regional Meeting (Team One)

NEEDS AND RECOMMENDATIONS

1. A new centralized tourism agency is needed in the Federal Government with high-level and prestigious leadership and influence. Such an organization would serve as an informational clearing house and liaison for the states and cities, a coordinating agency for Federal activities in tourism and travel, and a watchdog agency to ensure implementation of Federal legislation associated with a National Tourism Policy.

Several possible alternatives are available for developing such an agency including restructuring of the U.S. Travel Service (USTS), joining of USTS with other agencies, etc., but no matter how the agency is developed, tourism activities within the fifty Federal agencies currently involved in tourism and travel should be increased in priority. (93 points)

2. A National Tourism Policy is needed which takes full account of the economic impact of tourism on the United States. This impact should be reflected in the priority assigned to tourism and travel in individual Federal agencies. (91 points)

3. The tourism and travel industry's needs and importance should be fully considered in development of emergency energy allocation procedures by the Federal Government. Tourism should be recognized as an essential industry on the basis of the number of jobs and amount of consumer spending generated by the industry. (89 points)

4. A National Tourism Policy should ensure that adequate funding is made available to ensure that any new centralized tourism agency has the financial resources to operate effectively. (89 points)

5. There is a need to streamline Civil Aeronautics Board (CAB) administration of the airline industry regulatory structure, including expediting of the CAB docket to reduce delays on applications. In addition, the CAB should be more responsive and sensitive to the needs of the tourism and travel industry. For example, the regulatory structure should be made more supportive of tourism and travel needs, through such measures as approval of incentive fares for off-peak and off-season travel and rejection of current deregulation proposals which would impair service to smaller markets and raise fares. (87 points)

6. Non-immigrant visa requirements and procedures need to be improved to facilitate the flow of foreign visitors into the United States. Although visa requirements have been apparently simplified for many foreign nationals, the administration of the approval process and the attitudes of foreign consular officials could be greatly improved. (84 points)

7. Federal agencies whose activities have potential impacts on the tourism and travel industry should be required to prepare a tourism impact statement similar to an environmental impact statement before undertaking such activities. (84 points)

8. A Federal informational clearing house needs to be established which will coordinate the collection, organization and dissemination of such matters as information on pending tourism- and travel-related legislation; state government positions, attitudes and degree of support for tourism and travel; and comparative lodging and sales taxes and sources of tax income in different states and localities. (84 points)

9. The Federal Government should assist in coordinating tourism research studies at the Federal, state and local level; in particular. the Government should coordinate among Federal agencies, Discover America Travel Organization (DATO), and the U.S. Travel Data Center the dissemination of research findings to the state/local public sector and private sector. (84 points)

10. There is a need to educate Federal, state and local officials concerning the economic importance of tourism. (84 points)

11. The Federal Government should support efforts to alleviate seasonality problems in the travel and tourism industry. Seasonality peaks and valleys make investment capital amortization relatively difficult. An appropriate Federal involvement might include support for stimulation of more foreign visitors during the off-peak seasons, new incentive fares, support for development of off-season destination attractions and assistance in promoting off-season convention activity. (84 points)

12. There is a need for new legislation "with some teeth in it." In other words, a National Tourism Policy needs to be backed by legislation which will ensure that Federal agencies are responsive to the objectives and requirements of such a National Tourism Policy. (82 points)

13. Definitions of research terms and categories in the tourism and travel industry need to be standardized; the Federal Government can play a role in developing suggested guidelines for research methodologies. (80 points)

14. There is a need to maintain a licensing mechanism for tour brokers and wholesalers. (80 points)

15. Greater Federal/state/local communication is needed concerning current tourism- and travel-related programs at the Federal level. At present, there is a widespread lack of knowledge concerning Federal program opportunities. One means of improving channels of communication would be for each Federal agency involved in tourism to designate an office or individual within the agency responsible for tourism-related activities and liaison with the tourism and travel industry. (78 points)

16. The U.S. Army Corps of Engineers lakeshore management plans should be required to include specific priorities for tourism and recreational facilities development; frequently, such priorities are not included. (78 points)

17. U.S. Information Agency (USIA) promotion materials for international travel to the United States should be made available for domestic promotion programs of states and local areas. (78 points)

18. Federal support is needed for a rationalization of airline incentives fares to support an expansion of domestic tourism and travel. (78 points)

19. The U.S. Army Corps of Engineers needs to take account of environmental priorities as well as tourism industry needs in its development projects. In addition, there is a need for greater coordination among the Corps of Engineers, the Environmental Protection Agency, and state conservation groups. (75 points)

20. There is a need for greater efficiency and coordination among Federal agencies involved in tourism and travel. Bureaucratic procedures in Federal agencies need to be made more efficient and coordination among such agencies needs to be improved. (75 points)

21. The U.S. Army Corps of Engineers needs to be more responsive and efficient in responding to requests for accurate information from the state/local public and private sectors on the administration and interpretation of lakeshore management plans. (73 points)

22. The Federal Government should possibly be involved in coordinating or supporting the coordination of local school vacations to coincide with Monday holidays, the end-of-summer season Labor Day, and other major holidays, to stimulate more travel and tourism. (73 points)

23. Federal administrative regulations and rulings based on the Highway Beautification Act need to be clarified and rendered more precise. At present, administrative interpretation is vague (e.g., the definition of an "informational" sign, etc.). (71 points)

24. There is a need for more up-to-date Federal research studies on outdoor recreation with a state and local focus; such studies need to be distributed in a timely manner as well. (71 points)

25. The U.S. Travel Service needs more foreign offices in potential foreign visitor markets. (69 points)

26. The need exists for a Federal official or office which would provide ready access to state and local public officials or private sector representatives seeking clarification of Federal regulations impacting on the tourism and travel industry (e.g., Highway Beautification Act). Such an office could be located in an expanded tourism agency, or in each of the Federal regulatory agencies involved in tourism. (69 points)

27. Federal coordination is needed to develop uniformity in state commercial tour bus regulations and approval requirements. (69 points)

28. A top-level directive is needed to U.S. consular officials overseas to better promote and support foreign visitor traffic to the United States. Such efforts could include an improvement in consular attitudes, expedition of the process of foreign visitor visa approvals, and inclusion of greater tourism promotion in U.S. Information Service activities. (67 points)

29. There is a need to speed up Bureau of Outdoor Recreation approval procedures for applications for matching funds for development of outdoor recreational facilities (delays are presently caused by the need to approve projects in terms of national heritage preservation criteria). (67 points)

30. The Immigration and Naturalization Service (INS) should make available foreign travel research data collected by INS to public and private sector officials in the tourism and travel industry. (67 points)

31. The current mechanisms for disseminating information on Federal tourism and travel programs are poorly designed and frequently irrelevant. These mechanisms need to be improved. (64 points)

32. Urban renewal and community redevelopment funds administered by the Department of Housing and Urban Development (HUD) should not be channeled into projects which erode the local tax base, force cities to increase lodging and sales taxes, and consequently, have a dampening effect on tourism and travel. (64 points)

33. Overseas visitors services in port-of-entry cities and elsewhere in the United States need to be expanded and enhanced. (64 points)

34. Amtrak service should be expanded to service more less-visited rural areas and stimulate tourism traffic into those areas. (64 points)

35. The Federal Government should encourage and support development of training and educational programs for the tourism industry in U.S. colleges and universities. The Government could provide grants and demonstration programs to stimulate greater development by the private sector and state and local public sectors. (62 points)

36. The new Internal Revenue Service restriction on income tax deductions for international convention travel should be reviewed and revised. (60 points)

37. Federal Highway Administration procedures for regulatory interpretation of the Highway Beautification Act should be streamlined. (60 points)

38. Federal coordination of state interpretation and implementation of the Highway Beautification Act needs to be improved to eliminate varying application and interpretation in different states. In addition, enforcement of the Act should be rendered uniform in all states. (56 points)

39. Federal financial subsidies should be provided to develop greater public bus transportation designed to stimulate tourism and travel. (56 points)

40. A clear Federal policy should be enunciated on the issue of developing and maintaining public parks through user charges rather than through general tax revenues. (53 points)

41. U.S. customs and immigration officials need to be better trained and less overworked. In addition, their attitudes toward foreign visitors need to be improved. (51 points)

Atlanta Regional Meeting (Team Two)

NEEDS AND RECOMMENDATIONS

1. Federal officials need to fully consider potential economic and employment impacts on the tourism industry in developing a National Energy Policy and emergency energy contingency plans. The week-end closing of service stations should be avoided. Such closings would impact peak travel days, would affect 43 percent of the employees in the industry, would substantially reduce local tax

revenues from the industry, and would critically affect the economic viability of some industry segments. (96 points)

2. A higher priority should be given to the tourism industry in Federal energy policies. The tourism industry is willing to accept a fair share of the impacts of energy conservation measures and emergency allocation procedures, but Federal policies should distribute the burden equitably among tourism and other industries. (93 points)

3. The U.S. Congress should have more control over the implementation of emergency energy allocation plans developed by the Federal Energy Administration. In addition, the tourism industry should be allowed to make inputs to Federal energy policy development prior to implementation of such policies to guard against actions that adversely affect tourism and travel.

In its energy planning, the Federal Government should provide greater support for development of public transportation (for fuel savings and better access to recreational facilities) and should promote as well the health and quality-of-life benefits arising from tourism and travel. (86 points)

4. The Federal Government needs to develop uniform definitions of tourism research terms, establish standard methodologies for data collection, and coordinate national, state and local research efforts. (80 points)

5. The tourism and travel industry needs more frequently conducted research surveys and collection of research data that is specific to tourism and travel, including a greater focus on rural tourism and outdoor recreational activities. (80 points)

6. Federal agencies and the U.S. Congress need to be made more aware of the importance of tourism to the national economy (through more reliable research on tourism and travel and better communication with and education of government officials). (80 points)

7. A National Tourism Policy should be based on a legislated National Tourism Policy Act. Such a National Tourism Policy should ensure better coordination among Federal agencies currently involved in tourism and travel-related activities (77 points)

8. The tourism and travel industry needs more suitably-defined research terms; in addition, these terms should be used and applied consistently from state to state and from one Federal agency to another. (76 points)

9. There is a need to consolidate the diverse number of existing Federal tourism programs (many of them with only secondary or tertiary significance for the agency currently administering them) into a centralized Federal tourism agency. This centralized agency should be empowered to request from other agencies assessments of programs and of regulations or actions that have economic, employment, or other impacts on the tourism industry. (76 points)

10. The Federal Government needs to create more port-of-entry cities to facilitate international travel to the United States. (70 points)

11. The Federal Government needs to develop better signage for Federal highways, including more specific travel service information, uniform signage throughout the United States, greater usage of international symbols, etc. (67 points)

12. The Federal Government should provide investment tax incentives for the tourism industry as it does for manufacturing. (61 points)

13. The Federal Government should encourage greater cooperation between domestic airlines and motorcoach operators in such areas as development of package tours involving combined air and ground transportation. In addition, better bus designs are needed to improve the quality of ground transportation (59 points)

14. Federal highway signage needs to be improved, particularly in the area of travel service information (due to the elimination of informational billboards). (57 points)

15. The U.S. Travel Service needs to place more emphasis on domestic promotion of travel in the United States through such measures as a matching-funds promotional program for states and local areas with a minimum of bureaucratic red tape. (56 points)

16. There is a need to revise conflicting Federal legislation that prevents the sensible use of Federal block grant funds for tourism development. (55 points)

17. There is a need for greater research on foreign traveler motivations and requirements when traveling to the United States as well as a need for better overseas visitors services (language assistance services, Customs/Immigration procedures, etc.). (52 points)

18. The tourism and travel industry needs more effective research efforts and a higher priority for tourism and travel within the Department of Commerce in order to educate government decision makers at all levels of government on the positive impacts of tourism and travel. (52 points)

19. Airline service to some cities needs to be increased in order to correct current imbalances in service. (51 points)

20. Federal programs dealing with outdoor recreation need to have a centralized focus within the Federal Government. (44 points)

21. The insufficiency of current efforts at Federal interagency cooperation needs to be rectified by reducing competition between agencies and developing new mechanisms for cooperation. (43 points)

22. Fragmentation in existing Federal programs needs to be eliminated in order that Federal activities in the tourism and travel field can be focused on meeting the top priority needs of the industry. (43 points)

23. The Federal Government needs to provide state and local governments with an inventory of Federal programs on tourism as well as better information on Federal funding programs to make funds more accessible. (43 points)

24. The Federal Government needs to improve the efforts of the U.S. Travel Service to promote the United States overseas as a tourism destination. The image of the United States as a travel destination should be made more positive and uniform promotional procedures should be established. (43 points)

25. Bureaucratic "red tape" in Federal agencies needs to be eliminated and procedures need to be simplified. At present, overly complex and time-consuming procedures have a discouraging effect on tourism development and promotion. (41 points)

26. A consistent Federal policy is needed concerning the degree to which Federal agency activities are allowed to compete with private industry. For example, the National Park Service is allowed to compete with the private sector of the tourism and travel industry, while the U.S. Travel Service is not allowed to do so. (40 points)

27. A National Tourism Policy needs to consider the need for protection of the environment in future development of the tourism and travel industry. (33 points)

28. Federal agencies with responsibility for administering public recreational lands need to effectively address the problem of overuse of facilities, with top priority given to alleviating overcrowding at currently saturated facilities (especially the national parks). (32 points)

29. Federal funding is needed to develop and promote U.S.-based international trade fairs and other tourism-generating international events. (31 points)

30. The Federal Government should support development of career training and educational programs in the tourism and travel field to help professionalize tourism-related activities. Examples of such programs could include urban preservation and management of tourism properties. (28 points)

31. Federal support is needed for better planning of tourism facility development efforts. In addition, additional Federal funding assistance is needed for development and operation of tourism facilities. (28 points)

32. Domestic tourism promotion programs of the Federal Government should emphasize the depth and quality of available tourism experiences (e.g., arts, history, special events and attractions, etc.). (28 points)

33. The National Park Service needs to improve the quality and distribution of informational materials available to travelers among the general public. In particular, the information contained in such materials should be designed to better meet the needs of travelers. (25 points)

34. The U.S. Travel Service should confine itself to overseas promotion of the United States; the Agency should not involve itself in domestic promotion programs. (15 points)

35. In the interest of consumer protection, the Federal Government should support national standardization of inconsistent state consumer protection regulations, should simplify and perhaps centralize taxation of tourists and travelers, and should rate hotels nationally with a uniform rating system. (24 points)

36. The National Landmarks Committee needs to be upgraded in stature (perhaps to the level of a Presidential Commission). The Committee should be given an expanded role in making national historical sites more accessible to the public. (20 points)

37. The Federal Government needs to review and revise current policies with respect to tourism/recreational facilities user charges on Federally-owned properties. User charges should be established on a more equitable basis, and a clear

89-959—77——9

policy should be enunciated on the degree to which Federally-owned properties will be allowed to compete with private industry (with respect to user charges). (17 points)

38. The Federal Government needs to standardize lease and permit policies of the various public land agencies. (17 points)

39. The Occupational Safety and Health Administration needs to establish greater consistency in its regulatory rulings. (17 points)

Chicago Regional Meeting (Team One)

NEEDS AND RECOMMENDATIONS

1. There is a need for less duplication and better coordination of Federal tourism activities and programs in both Federal agencies and the Congress. (100 points)

2. State tourism agencies need administrators and staff who are well qualified and experienced in the tourism and travel field. The present widespread practice of making frequent political appointments to state tourism agencies should be halted. (96 points)

3. The tourism industry needs greater quantitative research in patterns of travel, traveler motivations, and travel-related expenditures. Greater research with a state and local focus is required. The Federal Government should concentrate on foreign and interstate travel, with states and local governments concentrating on travel in their own areas. Research on travel-related expenditures is needed as a tool for educating Federal, state, and local officials concerning the economic importance of tourism and as a means for developing a constituency for the industry in the private sector. (96 points)

4. A Federal agency will be needed to implement legislation arising out of the National Tourism Policy Study. Whether this is a new or restructured Federal agency, its director should be accorded a Cabinet-level status in the Executive Branch. If this proves unfeasible, the director should be given at the least the equivalent of an Under-Secretary position. (93 points)

5. The tourism and travel industry needs effective Federal legislation with some "teeth" in it (i.e., enforcing mechanisms) which will bring about actual changes in current Federal activities in the tourism field and will result in tourism and travel being treated as a priority matter in Federal policy and program formulation. (92 points)

6. State and local officials need to be properly educated concerning the economic and social value of tourism and travel. (90 points)

7. The Federal Government needs to coordinate rather than compete with the private sector of the tourism industry in tourism development activities. Federal agencies sponsoring or managing tourism development projects should plan and assess the potential negative impacts of such projects on the private sector prior to their commencement. (90 points)

8. A National Tourism Policy is needed which fully recognizes the economic importance of the tourism and travel industry. (90 points)

9. State and local governments should step up their funding of tourism research activities; the Federal Government should encourage them to do so. (89 points)

10. State and local governments should allocate tax revenues for tourism development and promotion not simply from general funds, but from specifically earmarked sales and lodging tax revenues. (89 points)

11. Better coordination of tourism research activities is needed within existing Federal agencies and departments such as the Department of Commerce. (89 points)

12. Tourism should be accorded the status of an essential industry by the Federal Government in Federal emergency energy allocation planning. (87 points)

13. Federal regulations frequently have severe negative impacts on the tourism industry at the state and local level. A National Tourism Policy should require proper assessment of Federal regulations by agencies prior to their promulgation and implementation. A "tourism impact statement" requirement would be one means of accomplishing this goal. (87 points)

14. Federal agencies developing methodologies and approaches for the gathering of social and economic research data which could have importance for tourism research should be required to include tourism research needs as a criterion in developing such methodologies and approaches. (87 points)

15. Federal and state agencies need to develop specific and explicit criteria concerning the conditions under which the public sector should intervene to directly develop and manage tourism resources and attractions. (87 points)

16. State tourism officials need to be insulated from the political process to ensure a continuity in experienced personnel over time. (86 points)

17. Small businesses in the tourism field need greater, more effective financial and technical assistance from public sector agencies in such matters as updating facilities, increasing management effectiveness, and responding more effectively to market conditions. (86 points)

18. There is a need for more Federally-supported feasibility and economic impact studies of potential Federally-funded capital investment projects in the tourism field. (86 points)

19. The private sector of the tourism and travel industry needs to agree on standardized research data terms, categories, and methodologies. Such data categories and research methodologies need to be rendered more responsive to the research needs of the private sector. The private sector may require the assistance of the Federal Government in developing suggested guidelines for research terms and methodologies. (86 points)

20. Local government support for tourism activities such as conventions needs to be increased through educating local officials concerning the economic contribution such activities can make to the health of local economies. (84 points)

21. The tourism industry needs to develop a constituency in the private sector if government officials are to be convinced of the significance of the industry and the importance of making government more responsive to the industry's needs. (84 points)

22. The interpretation and application of Federal regulations affecting the tourism and travel industry at the state and local level is frequently confusing and contradictory. Conflicts in regulations administered by separate agencies need to be resolved, the criteria and conditions for applying specific regulations need to be clarified and rendered uniform, and clear channels need to be established for the regulated to appeal or seek clarification of agency rulings. (84 points)

23. Federal research efforts in the tourism and travel field need to be more responsive to state and local needs. Federal agencies frequently ask for data inputs which are specific to state and local areas; however, when the results of the research are disseminated to state and local areas, they are not disaggregated in a form which would be useful for state and local development and promotional planning. (84 points)

24. Many Federal agencies need to develop more effective and efficient channels of communication with state and local officials. (83 points)

25. Tourism and travel should be understood and promoted as an activity or process involving, for each individual traveler, the supply and consumption of numerous types of services in a number of different locations. The traditional view of tourism as "destination-oriented" ignores the interdependence and complexity of the tourism and travel industry. (83 points)

26. Federal criteria for allocating development and promotional funds should be based on the view of tourism as a process with widespread economic impacts rather than as a discrete "destination-oriented" activity. (83 points)

27. Federal officials need to develop greater understanding of tourism activities and greater appreciation for tourism needs at the state and local levels. (83 points)

28. There is a need for a National Transportation Policy. (83 points)

29. The Small Business Administration (SBA) needs to become more responsive to the needs of small businesses in the tourism and travel field. Many small tourism businesses fail to qualify for financial assistance under SBA's lending criteria. (83 points)

30. Growth and development objectives of the tourism industry need to be reconciled with the nation's long-term environmental requirements and values in such a way that both types of goals can be successfully pursued. (83 points)

31. The Federal bureaucratic approval process needs to be streamlined. The process of obtaining regulatory or funding approval is frequently costly, time-consuming, and discouraging with such agencies as the Small Business Administration, the Economic Development Administration, the Bureau of Outdoor Recreation, the U.S. Army Corps of Engineers, the Environmental Protection Agency, and the Federal Energy Administration. (82 points)

32. A centralized clearinghouse and coordinating agency needs to be established at the Federal level to coordinate Federal lending and matching-fund activity in

the tourism field by agencies such as the General Services Administration, the Economic Development Administration, and the Small Business Administration. In addition, such a clearinghouse would be responsible for ensuring smooth channels of communication and the effective dissemination of information on tourism research and Federal programs both among Federal agencies and between the Federal Government and state and local governments. (82 points)

33. Channels of communication need to be improved between Federal agencies such as the U.S. Travel Service (USTS) and state development and promotion agencies on matters such as technical assistance proposals. (81 points)

34. The Federal Government should make efforts to educate state and local officials on the importance of tourism. (80 points)

35. Regional Commissions, state governments, and local governments need to expand coordination and cooperation in tourism development and promotional efforts. (80 points)

36. USTS should develop promotional literature and undertake more promotional activities with a state and local focus. (80 points)

37. Greater development is needed of intra- and intercity public transportation facilities such as motor coaches and passenger railroads. (80 points)

38. A top-level directive from within the Department of Transportation is needed to establish clear and uniform criteria for informational signing on the nation's highways under the Highway Beautification Act. (79 points)

39. The National Travel Survey should be conducted annually rather than every five years. (79 points)

40. USTS needs more effective, well-trained and experienced administrative and staff personnel. (79 points)

41. The tourism and travel industry needs to undertake greater promotion of off-season (i.e., winter) tourism and to support the development of necessary supporting services and attractions. (79 points)

42. The Economic Development Administration needs to provide greater support for tourism development projects undertaken by small businesses. The current minimum lending criterion (at least a $500,000 capital investment) is too high to permit most small businesses to qualify. (77 points)

43. USTS needs greater funding. (77 points)

44. Regional Commissions need to be better educated concerning the importance of funding for tourism promotion on the regional and state level. (77 points)

45. Federal research activities need to be oriented more towards generating data which is useful for decision-making by states and local governments on tourism planning and development activities. At present, most Federal research is designed to support promotional activities. (77 points)

46. State government tourism activities frequently suffer from inter-agency jealousies and conflicts over "territorial" prerogatives. State governments need to structure and coordinate state tourism activities more efficiently. (77 points)

47. The tourism and travel industry needs comprehensive planning of available resources, activities, and future needs in areas in addition to outdoor recreation (as currently carried out under the State Comprehensive Outdoor Recreation Planning process.) (77 points)

48. The Federal Government needs to develop programs providing one-to-one technical assistance and support for small business managers in areas such as tourism business management and financing techniques. (76 points)

49. The Federal Government should provide better stimulation and coordination of private sector tourism development and promotional activities. (74 points)

50. The availability of Federal matching-funds for tourism promotion and development needs to be expanded. (73 points)

51. The Federal Highway Administration should encourage the establishment of uniform criteria by state governments for highway informational signing under the Highway Beautification Act. (73 points)

52. The Federal Government should coordinate the development and dissemination of consumer research data and consumer promotional materials among states and local areas. Actual research and development of materials should be left primarily to states and cities, however. (71 points)

53. Federal agencies need to provide better information to state and local officials on the availability of Federal research and survey data. (71 points)

54. The Federal Government should either support and coordinate or undertake directly a survey of travel and tourism data currently available at state and local levels. (71 points)

55. There is a need for more Federal technical assistance to states and local areas in the fields of tourism planning, development, and promotion. (70 points)

56. Bureau of Outdoor Recreation approval procedures for matching-grants under the Land and Water Conservation Fund program need to be simplified and streamlined. (69 points)

57. There is a need to develop more private or quasi-private sector agencies or organizations charged with supporting tourism promotion and development in order to avoid the "political" problems indigenous to state and local government tourism agencies. (61 points)

58. The tourism industry needs to develop a Federal lobby to support small business interests in the tourism field. (66 points)

59. Travelers need to be provided with more accurate and detailed consumer information on tourism and travel services and products. ((66 points)

60. The Bureau of Outdoor Recreation's Land and Water Conservation Fund program should be better funded. (64 points)

61. There is a need for greater development of promotional materials in foreign languages to stimulate foreign travel to the U.S. (57 points)

62. The tourism industry needs to overcome popular resentment to the expansion of tourism activities and attractions among regional and local populations. Frequently the general public resents "out-of-staters" using state parks and other recreational facilities financed by state tax revenues. (57 points)

63. The Federal Government needs to provide state and local officials with advance information concerning the scheduling of Federally-sponsored "familiarization" tours. (54 points)

Chicago Regional Meeting (Team Two)

NEEDS AND RECOMMENDATIONS

1. The Federal Government needs to provide the tourism and travel industry with credible and uniform research data. This data should be disaggregated at state, regional and local levels to assist the industry in planning for tourism promotion and development. (90 points)

2. The tourism and travel industry needs better information on existing Federal tourism programs and a single source for tourism program information. Programs are currently too fragmented. (83 points)

3. The Federal Government needs to step up efforts to generate in-depth tourism economic data for economic development planning. (80 points)

4. Tourism data is needed on an on-going, regularly updated basis (i.e., five-year surveys with an annual update). (75 points)

5. A Federal Government spokesperson or office is needed to ensure that the interests of the tourism and travel industry are properly represented and supported in national energy and transportation policy formulation. Such an office or spokesperson would make inputs to appropriate agencies on policies concerning automobile regulation, use of highway development funds, emergency energy allocation plans, promotion of the use of fuels other than gasoline, and the development of alternative modes of travel such as public mass transportation to conserve energy. (71 points)

6. The Federal Government needs to develop a series of "National Indicators" for the tourism and travel industry similar to the Commerce Department's indicators of Gross National Product, Industrial Production, and the like. This will permit the measurement of short-term trends in the industry. (70 points)

7. A centralized source within the Federal Government is needed to coordinate tourism and travel activities among Federal agencies. Such a centralized source could take many forms, including a Federal agency, a national task force, a Cabinet-level spokesperson, and a Presidential assistant for tourism and travel.

Such a centralized agency or body should have a professional staff with responsibility for such matters as providing technical assistance on tourism promotion and development and guidance on impending Federal legislation to state and local governments.

The agency or body would initiate a national tourism planning process to coordinate planning among Federal agencies, monitor Federal activities likely to have impacts on the tourism industry, eliminate overlaps among agencies, initiate state comprehensive tourism planning, and develop long-range contingency plans for alternative developments in the tourism and travel field such as energy shortages and economic recession.

In addition, the agency or body would coordinate research data collection among the U.S. Travel Data Center, the Bureau of the Census, and other Federal agencies and would invite inputs from state and local governments in setting priorities for data collection and tourism planning. (68 points)

8. More effective and better-funded programs are needed to promote the United States as a travel destination. (66 points)

9. State and local governments and the private sector need better information concerning which private organizations and government agencies currently collect tourism data and the manner in which that data is distributed. (63 points)

10. The Federal Government should develop common definitions for tourism research terms so that data is more useful. Such an effort should include the redefinition of some existing terms to make them more realistic. (61 points)

11. Better communication is needed between the Federal Government and the states on Federal policies. (61 points)

12. The U.S. Travel Data Center needs additional funding to expand data collection activity. (55 points)

13. A more equitable system is needed for the distribution of Federal matching funds for international tourism promotion. States and regions with low tourism budgets are frequently unable to match Federal funds under current formulas. (58 points)

14. A single Federal agency with adequate funding should have prime responsibility for international promotion of the United States as a tourism destination. (58 points)

15. The Federal Government should sponsor a greater number of specialized tourism studies in fields such as urban tourism, rural tourism and tourism in particular states. (56 points)

16. The Federal Government needs to develop more effective immigration and customs procedures for processing of foreign visitors at ports-of-entry. The Government should also support development of better interpreter, money exchange, and travel information services for international visitors. (56 points)

17. The tourism industry needs market data suitable for capital investment decisions. (55 points)

18. The U.S. Travel Data Center needs additional funding to expand data collection activity. (55 points)

19. Uniform informational highway signage is needed, especially since the Highway Beautification Act is limiting commercial signing. (55 points)

20. A National Tourism Policy should include a process for continuous dialogue between the Federal Government and states, cities and the private sector; institutionalization of the role of state and local governments in Federal tourism policy development; and development by the Federal Government of professional standards for state tourism directors. (55 points)

21. Federal tourism promotion programs should focus greater efforts on promoting travel among the non-traveling segment of the U.S. population. (53 points)

22. Tourism needs to be promoted with non-travelers. (53 points)

23. Studies need to be undertaken on current and future uses of leisure time in the light of current trends towards a shorter work week. (51 points)

24. The tourism and travel industry needs to determine accurately the impact of Civil Aeronautics Board fare regulations on travel to various U.S. and overseas travel destinations. (51 points)

25. The Federal Government needs to negotiate less restrictive customs agreements with Canada. At present, the Canadian Government requires that U.S. organizations use Canadian firms to develop promotional programs and restricts the import of U.S. tourism promotional materials into Canada. (51 points)

26. Officials of the Economic Development Administration (EDA) and the Small Business Administration (SBA) need to be educated as to the economic and employment benefits of tourism development. At present, personnel in both agencies generally have a negative reaction to tourism development. (50 points)

27. The Federal Government needs to better understand and promote areas of special interest to the potential tourist. (50 points)

28. Both the Federal Government and the tourism and travel industry need to recognize and understand environmental limitations on tourism development. (50 points)

29. Environmental management of natural resources needs to be better understood by Federal agencies responsible for management of public lands. (50 points)

30. Existing Federal matching-funds programs require complex applications that need simplifying. (48 points)

31. Federal programs promoting travel to the United States should promote regions of the United States rather than specific states. (43 points)
32. The tourism industry needs uniform travel tools to aid in promoting the special travel interests of various segments of the tourism market such as campers. (43 points)
33. The National Tourism Policy Study needs to include imputs from small cities. (43 points)
34. The Bureau of Outdoor Recreation needs to broaden its state planning assistance program to encourage the inclusion of more tourism activities in state outdoor recreation planning. (42 points)
35. Federal funding of state promotional programs should be designed to expand the total travel market rather than simply stimulate competition between states for the same tourism dollar. (40 points)
36. The environmental impact review process under the National Environmental Policy Act needs streamlining and perhaps more funding for a larger staff to reduce associated delays in tourism facility development. (38 points)
37. The tourism industry needs better support of tourism from the media. (35 points)
38. More effort needs to be focused on promoting travel in the United States by Canadian and Mexican citizens. (33 points)
39. Federal tourism programs should not support or contribute to competition between states for tourism business. (32 points)
40. The National Tourism Policy Study needs to review Federal programs with a rural emphasis. (28 points)
41. Federal involvement is needed in media promotion of tourism. (27 points)
42. The U.S. Forest Service planning process causes delays in development of tourism facilities and needs to be revised and streamlined. This is particularly true for environmental and economic impact analysis carried out as part of the planning process. (23 points)

Denver Regional Meeting (Team One)

needs and recommendations

1. There is a need for a new and broader definition of the tourism industry, both from a conceptual and an image point of view. A simple step in the right direction would be changing the industry's terms of reference from "tourism" to "tourism and travel" or a similar hybrid definition which would better express the breadth and complexity of the industry. (100 points)
2. Greater comparability is needed in the research data on which various Federal, state and local agencies base their tourism planning, development and promotion. The Federal Government should support tourism research which will provide a data base with common denominators among different regions and with other industries. (100 points)
3. The Federal Government needs to support greater coordination of the research efforts of Federal, state and local agencies as well as private and quasi-private sector research institutions such as the U.S. Travel Data Center. (100 points)
4. More accurate and in-depth research data on travel expenditures at the national, state and local levels need to be developed to indicate to public officials the economic importance of the industry. (100 points)
5. There is a lack of solid data on the employment-generating potential of the tourism and travel industry; the Federal Government should support research to develop such data. (100 points)
6. The scope of research at the Federal level should be expanded so that the tourism research data base can be disaggregated at the state and local level. In addition, the Federal Government should develop a Standard Industrial Classification (SIC) code for tourism which will permit industry disaggregation and comparison of tourism's economic importance relative to other industries. (100 points)
7. The Federal Government should support research aimed at establishing accurately the national, state and local tax bases which the tourism and travel industry supports. (100 points)
8. There is a lack of appreciation of the travel industry and its importance at all levels of government. The industry needs to clearly establish its importance to the general public and to public officials responsible for research, development

and promotional funding. This will require additional research, education and effective public relations activities on the part of the industry. (100 points)

9. Greater coordination of tourism porgrams is required among Federal, state and local tourism agencies. (100 points)

10. The U.S. Travel Service (USTS) as presently constituted cannot effectively coordinate travel programs at the Federal, state and local levels. There is a need to place such coordinating responsibilities within USTS or a similar Federal agency. (100 points)

11. The National Travel Survey, carried out every five years by the Bureau of the Census, should be updated annually. (100 points)

12. The Federal Government should support the development of a uniform methodology for substantiating the impact of travel promotion expenditures on the growth of tourism and travel. (100 points)

13. A Federal clearinghouse needs to be established to provide state and local governments and the private sector with information on tourism legislation, Federal agency activities and programs, and programs and activities of states and localities. (100 points)

14. The Federal Government and the travel industry need to support an expansion of educational/promotional programs for the general public designed to increase the public's understanding and awareness of the value of tourism. Programs should also be designed to educate the public on tourism opportunities available in the United States, and specific means for taking advantage of those opportunities. (100 points)

15. The Federal Government should support the development of career-training programs for the tourism and travel industry at colleges, universities and vocational schools. (100 points)

16. The Federal Government should support industry efforts to alleviate seasonality problems in the tourism and travel industry. The Government should encourage the introduction of staggered school vacations (i.e., the 12-month school year), the continuance of Monday holidays, and the postponement of fall season school openings until after the Labor Day weekend. In addition, the Federal Government should consider providing matching funds to state and local programs that reduce seasonality—providing that the benefits of reduced unemployment insurance and welfare payments to seasonally unemployed exceed the costs of such matching funds. Perhaps more importantly, such program support would have social and career benefits that go beyond the simple economic benefits. (100 points)

17. The tourism industry needs to promote cities as "total destination packages," emphasizing the availability of tourism attractions, shopping, cultural events, and quality services. The Federal Government should coordinate existing Federal urban redevelopment programs to assist cities in developing tourism and recreational resources that support this "total destination" image. (100 points)

18. The National Park Service (NPS) needs to become more responsive to the regional development needs of areas in which it operates; specifically, NPS needs to modify current overly restrictive environmental protection policies on public lands under its management. In addition, NPS needs to better articulate and communicate its decision-making process to state and local officials and representatives of the private sector, and be more responsive to public testimony by industry representatives. (100 points)

19. The National Park Service budget and staff for development and maintenance of the national parks should be increased; at present, the staffing and funding for national parks is inadequate. (100 points)

20. The objectives of the National Park Service program and the Wilderness Act need to be better reconciled. (100 points)

21. The National Park Service needs to encourage more balanced and efficient utilization of the national parks by the public through educational and promotional programs. (100 points)

22. Nonimmigrant visa application procedures need to be streamlined for foreign visitors, and visa requirements should be eliminated for most foreign travelers from countries granting reciprocal visa waiver privileges to U.S. citizens. (100 points)

23. The Federal Government should develop greater coordination among policies and programs of Federal agencies having an impact on international visitor facilitation. Such agencies include the Bureau of Customs, the Immigration and Naturalization Service, and the Civil Aeronautics Board. (100 points)

24. Federal agencies whose policies and programs have an impact on international visitor facilitation should be more responsive to criticism of their activities by state and local governments. In particular, the Bureau of Customs should be required to participate in local programs held by gateway cities to improve conditions for foreign visitors arriving in the United States. (100 points)

25. Federal, state and local governments all need to facilitate entry for the growing number of international charter flights arriving in the U.S. Such efforts towards facilitation should not be limited to East and West Coast ports-of-entry, but should be focused, as well, on interior states and cities with potential as destinations for foreign charter flights. (100 points)

26. The Bureau of Land Management needs to develop better channels of communication with state and local officials and representatives of the private sector. (100 points)

27. The Bureau of Reclamation has been generally responsive to state needs. (100 points)

28. The Bureau of Outdoor Recreation has been generally responsive to state needs. (100 points)

29. The Bureau of Indian Affairs needs to develop better channels of communication with state and local governments. At present state and local officials tend to try and circumvent the Bureau because of difficulties in establishing effective communication and coordination. (100 points)

30. The U.S. Army Corps of Engineers needs to be more responsive to state and local needs and should develop better working channels of communication with state and local officials. (100 points)

31. Programs of the Economic Development Agency have generally had a positive impact on the tourism industry. (100 points)

32. The Federal Energy Administration has been unresponsive to the needs and requirements of the tourism industry. The Federal Government in developing future energy policies and programs needs to ensure that the needs of the tourism industry are given adequate consideration and priority. (100 points).

33. The tourism industry needs to educate the Federal Energy Administration and the Congress to ensure that Federal officials will not, in the event of another serious energy crisis, promote the concept that travel is unpatriotic. (100 points)

34. State and local governments should be encouraged by both the Federal Government and the tourism industry to expand tourism development planning activities. Properly carried out planning which is sensitive to local and regional needs, as well as the needs of the private sector, can be of benefit to the entire industry. (80 points)

35. Consumers need better protection in their dealings with the tourism and travel industry. In particular, consumers need to be protected when purchasing tour packages, some of whlch are poorly planned or underfinanced. (80 points)

36. Greater Federal funding should be provided for feasibility studies of potential tourism and recreational projects to increase the efficiency of capital investment in the tourism industry and assist the industry in effective planning. (70 points)

37. Public officials at all levels of government need to recognize tourism and travel as a technique for regional economic development. Federally-supported development programs such as those of the Bureau of Outdoor Recreation, the Economic Development Administration, and the Small Business Administration, should be expanded. (70 points)

Denver Regional Meeting (Team Two)

needs and recommendations

1. The tourism industry needs better tourism-specific information from the 1977 Travel Survey with more emphasis on auto travel. (86 points)

2. More research is needed on convention business and urban tourism to assist cities in developing market information for investment decisions. (84 points)

3. The United States needs a national tourism plan that would consolidate existing programs into an existing agency, coordinate existing programs, and assure the consideration of new programs' impacts on tourism. (84 points)

4. States and cities need more and better promotional materials from Federal agencies such as the National Park Service. Private sector experts should be used to upgrade existing materials. (78 points)

5. Research is needed to more accurately determine the costs and benefits of tourism development on a regional, state and local basis. (76 points)

6. The tourism and travel industry needs to be consulted in developing a National Energy Policy. (76 points)

7. The United States needs a National Transportation Plan that considers energy problems, alternative transportation modes and further development of third-level carriers to insure access to tourism activities. (76 points)

8. Federal long-term tourism planning and research should consider likely future changes in social behavior and the quality of life such as the shorter work week, greater availability of local recreation opportunities, and year-round schools. (76 points)

9. The Federal Government needs to develop common definitions for tourism terms used for data collection. (74 points)

10. Service industries are not well defined for statistical purposes; the Federal Government should develop a Standard Industrial Classification (SIC) code for tourism. (74 points)

11. The Federal Government needs to review existing Federal regulations and policies that impact on tourism and assess their continued desirability. In addition, the Government should assign a higher priority to tourism among Federal agencies such as the Corps of Engineers, the National Park Service, and the U.S. Forest Service; should develop a better balance between economic goals and quality-of-life goals in tourism planning; and should consider an expansion in the number of port-of-entry cities. (74 points)

12. The tourism industry needs to know the national energy (fuel use) priorities. (72 points)

13. Federal long-term planning and research needs to consider the potential impact of new technology and alternative energy futures. (72 points)

14. The U.S. Government and private industry need to provide more support for the U.S. Travel Data Center. (70 points)

15. More research is needed on the economic importance of tourism and its employment-generating potential to support programs aimed at educating legislators, Federal agencies, and private industry concerning the significance of the tourism industry. (70 points)

16. The tourism and travel industry needs to be consulted in developing a National Energy Policy. (76 points)

17. The Federal Government should provide guidelines for standardized data collection by states, local governments, and the private sector. (66 points)

18. A Federal inter-agency coordination mechanism needs to be developed to eliminate conflicts and duplication among tourism programs and programs that impact tourism. (66 points)

19. The U.S. Travel Service (USTS) needs more funds to increase its international tourism promotion efforts. USTS also needs to develop better coordination with the U.S. Information Agency (USIA). (66 points)

20. The Federal Government should undertake a domestic public education program to promote the benefits of travel, the ease of travel, etc. (64 points)

21. More up-to-date research information is needed by the tourism and travel industry. An update of the National Travel Survey every two or three years should be undertaken. (64 points)

22. Research surveys should be undertaken to determine the tourism needs and attitudes of foreign visitors. (64 points)

23. USTS should put more emphasis on helping to increase attendance at U.S.-based international events (e.g., trade fairs, conventions, etc.). USTS should also promote the United States as a site for international events. (64 points)

24. Federal Government promotional activities should be based on sound research. (62 points)

25. The Federal Government needs to take a stronger, more direct role in tourism research and promotion with coordination in other areas affecting tourism. (60 points)

26. The Federal planning process should include inputs from state and local governments to improve tourism development studies undertaken by the Economic Development Administration (EDA), The Bureau of Indian Affairs, and other agencies. (60 points)

27. There is a need for greater promotion of investment in tourism facilities and programs, especially by new capital sources. (60 points)

28. The Federal Government should make available to state and local governments comprehensive information on available tourism research data. (58 points)

29. The tourism industry needs to be sensitive to the need for tourism development compatible with natural resource conservation in the face of land-use saturation and overpromotion of popular tourism areas. (58 points)

30. Government programs are needed to promote multi-purpose recreational use of outdoor facilities developed principally for other uses than tourism and recreation. (58 points)

31. The Civil Aeronautics Board needs a better understanding of the impact of their rulings on the tourism industry, especially the impact of incremental rulings. (56 points)

32. The National Park Service or other Federal agencies should not develop national parks in urban areas at the expense of non-urban areas. (56 points)

33. More Federal support is needed for development of historic and cultural facilities around the United States. (56 points)

34. There is a need for better promotion of existing public land facilities such as campgrounds; in particular, there is a need for more accurate information on these facilities, more effective distribution of such information, and an emphasis on promotion of off-peak use of existing facilities. (56 points)

35. The Federal Government should re-examine customs regulations relative to Canada to achieve greater equity of treatment. (54 points)

36. The Federal Government needs a review process to insure implementation of existing agency missions and provide positive incentives to get Federal agencies to implement existing lagging tourism programs. (54 points)

37. States need a Federal matching-funds program for state tourism promotion based on the need for economic development in a given state. USTS should promote the United States in general, rather than specific regions or locations. (54 points)

38. The Federal Government should encourage private industry to promote U.S. travel overseas. (54 points)

39. Research is needed to develop more information on tax revenues generated by tourism activities and on employment within the tourism industry. (52 points)

40. The Federal Government needs to develop more parks and recreational opportunities in urban and rural areas as well as provide funds for operation of such facilities. (52 points)

41. The U.S. Travel Data Center needs to develop more locally specific data for use by state and local governments. (50 points)

42. Environmental Protection Agency air quality (non-degradation) regulations need to be reassessed; they are too restrictive to allow tourism facility development in some areas. (50 points)

43. The Federal Government should require a tourism impact statement for Federal development projects (or include tourism impacts under the National Environmental Policy Act) with approval based on a balanced consideration of energy, economic and environmental criteria. (48 points)

44. The Bureau of Outdoor Recreation's State Comprehensive Outdoor Recreation Plan program (SCORP) should encourage states to include tourism in their SCORP planning process. (42 points)

45. The Bureau of Reclamation needs to consider the impacts on tourism and travel of irrigation and industrial projects sponsored by the Bureau. (42 points)

46. The Federal Government should provide technical assistance to local communities to help them identify unique characteristics of their communities and thereby develop more effective tourism promotion programs. Assistance could be along the lines of the Department of Agriculture Extension Service. (40 points)

47. A more uniform and rational tourism taxing system is needed. The development of such a system requires development of a national data base of current tourism tax practices and procedures. (38 points)

48. The Department of Health, Education and Welfare (HEW) should survey the availability of emergency health care services in high-density tourism areas and should support expansion of those services where necessary. Similarly, HEW should review the availability and quality of water and sanitation facilities at tourism sites and support upgrading where necessary. (38 points)

49. Better distribution of water resources for tourism use is needed. (38 points)

Denver Regional Meeting (Team Three)

NEEDS AND RECOMMENDATIONS

1. Federal emergency energy allocation procedures have not been sensitive to the needs of Western states. Because of the long distances between centers of

population and tourism attractions, the automobile is critical as a means of transportation. Any new energy rationing procedures must be sensitive to the importance of the automobile for Western tourism. A tourism representative should be appointed to the National Energy Council to ensure that new procedures are sensitive to Western needs. (92 points)

2. Week-end closings of gasoline stations should not be included as one of the Federal Government's energy conservation measures. (92 points)

3. Federal energy allocation programs should include provisions which permit those who use public transportation for day-to-day commuting to have sufficient gasoline for personal travel on week-ends and during vacation periods. (86 points)

4. Federal matching funds programs are too complex. Matching fund application procedures should be simplified, and published guidelines on application procedures should be kept up-to-date. Reform in this area should be focused not only on specific Federal agencies with tourism responsibilities, but with the Office of Management and Budget as well, since this office will have a significant influence on approval of such reforms.

5. The Federal Government should limit itself to areas and approaches in the tourism field which states and local areas cannot manage on their own. Federal officials can develop guidelines and methods, but implementation should be left for the most part to state and local officials. Care should be taken to avoid the natural tendency for more and more Federal involvement as a catch-all or make-shift "solution". (84 points)

6. The National Tourism Policy Study time-frame is too slow; several Federal measures important to the tourism and travel industry may become effective prior to the completion of the Study. Thus, there is the immediate need for the formulation of a 10–15 person advisory board on tourism (representing both public and private institutions in the tourism field) to advise the Senate Committee on Commerce during the remainder of the National Tourism Policy Study, and to represent the views of the industry concerning impending legislation. (84 points)

7. There is a need for improved research methods to measure and assess all segments of the tourism and travel industry. More Federal funds should be made available for research in such areas as expenditure surveys and resource development opportunities, but research should be conducted primarily by state and local entities. The Federal Government should play a role, however, in the aggregation of findings from state and local research projects and in the dissemination of findings nationwide. (84 points)

8. The U.S. Travel Service (USTS) matching-funds program for tourism promotion needs to be better funded. (82 points)

9. The USTS matching-funds program needs to be revised and simplified. At present, the program is complex and hard to understand, and frequently it appears that USTS officials do not understand the objectives and functioning of their own program. (82 points)

10. The Environmental Protection Agency (EPA) is frequently a hinderance to tourism and recreational development. The EPA should be required to assess the economic impact of new environmental regulations on the tourism industry prior to their implementation. In addition, administrative rulings promulgated by Federal agencies such as the EPA under blanket authorization by Congress should be subject to Congressional review and approval prior to their implementation. (82 points)

11. Environmental interest groups frequently hinder tourism development. The tourism and travel industry needs to do a better job at representing development interests in proceedings arising over environmental issues. (82 points)

12. Federal programs in tourism and travel need to be consolidated to increase effectiveness and eliminate conflict and duplication. (82 points)

13. The Federal Government imposes too many regulations on small businesses in the tourism and travel industry. Small business regulation should be lightened and procedures simplified. New regulatory legislation should be specific with respect to the scope and objectives of the legislation to ensure that Congress and not Federal agencies will have to take responsibility for any negative impacts resulting from such legislation. (82 points)

14. USTS needs greatly increased funding for international promotional programs. The number of USTS offices overseas should also be expanded.

15. The U.S. Army Corps of Engineers should turn over its recreational development programs and funds to states and local areas. The Corps of Engineers' Lakeshore Management Program has frequently hindered rather than promoted

the development and provision of water-based recreational facilities. Local development programs have been inhibited, the Corps has frequently failed to develop potential recreational sites, and public hearings on Corps projects have not been well promoted in advance. (80 points)

16. The tourism and travel industry needs to develop greater political power and influence at all levels of government. (80 points)

17. Outer Continental Shelf petroleum resources off the Northeast United States need to be developed as rapidly as possible if sufficient petroleum supplies are to be available in the future. (78 points)

18. The tourism and travel industry needs a "voice" at the Federal level. A new tourism agency should be set up with a Cabinet-level Secretary as agency head, or, at the least, with an agency head with the same status as the Administrator of the Environmental Protection Agency. This agency could be called the Department of Travel and Recreation. It would coordinate Federal tourism activities and assume responsibility for a flow of information and communications in both directions between the Federal level and the state and local level.

The Agency should be formed from the nucleus of the existing USTS and would represent a reborn, restructured, and expanded USTS. The Agency should have an advisory council made up of state tourism directors (each director representing a regional grouping of states) and of representatives of the private sector (perhaps drawn from a nucleus of travel directors, private industry association representatives and lobbyists currently serving in Washington, D.C.) This advisory council would have the responsibility of ensuring proper liaison and communication between the Agency and state and local governments. (78 points)

19. The Federal signing program developed under the authorization of the Highway Beautification Act is a "sham." The program must be revised to allow tourism businesses to properly alert travelers to the availability of tourist services through informational signing on the nation's highways. (76 points)

20. Federal land-use legislation should be avoided. Federal land-use planning as currently proposed could put the tourism and travel industry out of business. (76 points)

21. There is a need for better articulation of tourism and travel research definitions. A set of standardized research guidelines should be developed by the Federal Government with respect to definitions of research terms, categories, and methodologies. These should be suggested guidelines for use by states and cities. (76 points)

22. The Federal Government frequently finds "its right hand opposing its left hand". For example, the Government funds programs to encourage travel and tourism and then restricts the availability of energy necessary for such travel. Federal program conflicts need to be identified and reconciled. (74 points)

23. Public leaders at all levels of government need to be educated concerning the dimensions of the tourism and travel industry and its economic and social importance. At present, many public officials are simply unaware of the tourism industry and its importance. (74 points)

24. The Federal Government should support more basic research by states and cities on traveler motivations and habits and the constraints which prevent a large segment of the population from undertaking travel at all. (74 points)

25. The proper Federal Government role should be to assist the tourism and travel industry rather than to hinder its development and operations. The Government tends "to kill the golden goose" by bogging down programs in red tape, complicated procedures and requirements, and poor channels of communication. Government procedures should be simplified. Federal agencies can assist states and local areas in domestic planning and development and should play the major role in international promotion of U.S. travel. Domestic promotion, however, should be primarily a state and local responsibility. (72 points)

26. The U.S. Post Office should permit state tourism agencies Federal franking privileges in the mailing of educational/promotional materials on state tourism resources, attractions, and services. Such promotional literature serves a genuine educational function. (72 points)

27. The Federal Government does not give the tourism and travel industry a sufficiently high priority in policy and program formulation. There is a need for a Secretary of Tourism and Travel to ensure such a priority for the industry. (72 points)

28. The U.S. Army Corps of Engineers is not sensitive to recreational program needs of states and local areas in its multi-purpose water project development programs. (72 points)

29. The social, health, and human values of recreation and tourism need to be better understood and appreciated by public officials and the general public. (72 points)

30. The U.S. Bureau of the Census should expand the coverage of the National Travel Survey and should increase the frequency of data collection to provide up-to-date information for the industry. (72 points)

31. The administration and interpretation of the Federal highway signing program by the Federal Highway Administration needs to be improved. Insistence should be placed on Highway Beautification Act policies which permit full highway signing. However, in order to achieve this, the industry should support Federal development of enforceable guidelines for a standardized informational and directional sign (although signs would be produced and paid for by private industry.) In addition, a set of standardized interpretations connected with highway signing regulations should be developed for all of the 50 states. (70 points)

32. Tourism research programs at all levels of government need greater numbers of highly-skilled, experienced, and professional staff and administrators. (70 points)

33. Federal funding for tourism research appears excessive relative to funding for "action" programs designed to stimulate development and promotional activities in the tourism industry. This is true for all Federal agencies with tourism-related programs. A better balance should be established in Federal funding efforts. (70 points)

34. Federal officials often appear to be infected with "Potomac Fever": that is, officials frequently fail to remain sensitive to the problems and characteristics of other regions of the nation. Greater Federal sensitivity and responsiveness to regional needs is required. (70 points)

35. The Federal Government needs to provide less assistance to international airlines and greater support for domestic airlines in its regulation of the airline industry. (70 points)

36. The tourism and travel industry needs to concern itself more with the quality and appearance of tourism facilities and services. The public has grown more sophisticated and discriminating in its demand for services; the best remedy for maintaining high standards in the industry is industry self-regulation. (55 points)

37. Better coordination and channels of communication are needed between the tourism and travel industry and Federal and state officials involved in the State Comprehensive Outdoor Recreation Planning (SCORP) process. Tourism and travel needs to be included in future SCORP activities. (70 points)

38. The tourism industry needs to encourage the Bureau of Outdoor Recreation to require incorporation of tourism in individual State Comprehensive Outdoor Recreation Plans. (70 points)

39. The Federal Government should better coordinate its research activities with the U.S. Travel Data Center (USTCD), and the respective roles of USTDC and various Federal research agencies should be clearly articulated. (70 points)

40. The Internal Revenue Service should alter its policy aimed at eliminating the non-profit tax-exempt status of Chamber of Commerces and other civic organizations and rendering them taxable as profit-making institutions. (68 points)

41. The general public needs to be better educated concerning the tourism attractions and travel experiences available within the United States. At present, the U.S. public is not sufficiently aware of its own country's national attractions and tourism resources. (68 points)

42. Promotional and advertising activities are currently given too much emphasis by both the public and private sectors of the tourism and travel industry. Both public and private officials need to put greater emphasis on research, planning, and tourism resource development, and management. (68 points)

43. Federal tourism programs should be focused on objectives which enhance the quality-of-life for the U.S. population rather than diminish it. Too often the reverse appears to be true. (68 points)

44. Tourism programs of the Bureau of Indian Affairs are largely failing to meet their objectives. The programs should be more realistic and sensitive to local and regional needs and should be more effectively administered as well. (63 points)

45. The National Park Service needs greater funding for development and maintenance of facilities in the National Parks. The Service generally does a good job with the funds it receives, but these are inadequate. (66 points)

46. The Federal Government should permit greater development of privately-owned resorts on Federal public lands. (66 points)

47. State governments should have greater influence in the formulation of Federal tourism programs for Indian reservations and greater control over the implementation of such programs. At present, programs of the Bureau of Indian Affairs frequently do not meet the needs of local citizens and are not well coordinated with other state and local tourism programs. (62 points)

48. Channels of communication and the flow of information on Federal programs between the Federal Government and state and local governments needs to be improved. (64 points)

49. National Park Service programs designed to develop accommodation facilities at National Parks appear to be aggravating rather than satisfying the need for expanded availability of facilities. In many cases, existing accommodations are being removed. (64 points)

50. USTS should solicit greater input from the state and local level in formulating domestic tourism promotion policies and programs. In addition, USTS should be promoting the entire United States rather than specific regions. (64 points)

51. The tourism and travel industry needs to develop more alternative travel packages and tours combining different modes of transportation such as Fly/Drive packages. (64 points)

52. The Federal Government should support the development of better facilities for foreign visitors, including expanded production of multi-lingual promotional and educational materials and training of a greater number of interpreters and foreign visitor guides. (64 points)

53. There is a need for a Federall-sponsored domestic tourism promotional program. USTS may or may not be the appropriate agency in which to lodge responsibility for such a program. (64 points)

54. The flow of information about USTS programs to state and local promotion agencies needs to be improved and expanded. (64 points)

55. There is a need for a broader research and planning effort in tourism. (64 points)

56. Federal grants should be increased for development by state and local governments of recreational facilities for the traveling public (62 points)

57. There is a need of a stronger Federal role in tourism. This need should be treated by the Government on a non-partisan basis and should not become a political issue. (62 points)

58. USTS programs need to be insulated from political considerations in their formulation and implementation. At present, some USTS programs appear to be influenced by politics. (62 points)

59. A retraining program should be undertaken to improve the attitudes and behavior of personnel of the Bureau of Customs. International visitors are frequently subject to harrassment and rude treatment. (60 points)

60. Foreign visitor visa regulations should be simplified and eliminated where possible. Such regulations inhibit international travel to the United States. (60 points)

61. Improved techniques for managing resources and tourists need to be introduced into the tourism and travel industry to cope with rising tourism demand and the increased difficulties of developing sufficient resources to meet that demand. (60 points)

62. The Federal Government needs to promote travel and tourism among the general public to overcome existing public apathy towards travel and tourism. (58 points)

63. The resource management capabilities of several Federal agencies involved in public lands management need to be improved. Frequently, the staff of such agencies do not have the experience and expertise to efficiently operate and maintain recreational services and facilities. (58 points)

64. Greater Federal technical and educational assistance is needed for small business managers in the tourism field. (58 points)

65. Ski facilities located on lands managed by the U.S. Forest Service should be required to operate under the same restrictions as competing private ski facilities in adjacent areas. Forest Service facilities should also charge fees high enough to prevent unfair competition with privately-owned facilities. (58 points)

66. "Travel" rather than "tourism" should be used by the Federal Government in its tourism and travel-related programs. The word "tourist" has unattractive connotations in the minds of many of the general public. (56 points)

67. AMTRAK service needs to be expanded in frequency. In addition, new routings need to be developed to meet local and regional needs. (54 points)

68. The Civil Aeronautics Board should support an expansion of the number of U.S. cities with direct linkages to major international air routes. (52 points)

69. The Federal Government should support a program for educating domestic travel agents about domestic travel opportunities similar to programs undertaken by Discover America Travel Organization (DATO) to acquaint foreign travel agents with U.S. travel opportunities. (52 points)

70. The Federal Government needs to develop a National Energy Policy which will promote greater production and use of small cars to slow the growth in energy consumption. (52 points)

71. The Civil Aeronautics Board needs to allow a larger number of carriers to provide service to isolated Western cities which depend primarily on the airlines to serve their local tourism markets. At present, an airline strike or work stoppage can have a crippling effect on local tourism. (48 points)

72. Facilities for foreign currency exchange for international visitors need to be substantially expanded within the U.S., particularly in the interior regions of the country and in smaller cities. (48 points)

73. Federal public works program funding should be channeled more to rural areas where unemployment is high. At present, the bulk of the funding is allocated to urban areas. (48 points)

74. The 55 mile-per-hour speed limit restriction should be made optional for Western states this restriction has severely damaged the tourism industry in small isolated communities. (46 points)

75. There is a need for more language-assistance programs to facilitate international travel to the U.S. (46 points)

76. U.S. Post Office regulations need to be simplified to assist state and local tourism promotional efforts. (44 points)

San Francisco Regional Meeting (Team One)

NEEDS AND RECOMMENDATIONS

1. There is a need to legitimize the tourism industry among government officials and the general public. Several steps can be taken to support this legitimizing process. More frequent tourism research should be undertaken, including an annual update of the National Travel Survey. Date on tourism expenditures and employment should be disaggregated to the local level (e.g., data for major cities should be broken out of data on tourism activities in Standard Metropolitan Statistical Areas). More reliable data should be generated in a form which can be easily accessed through a central data center. More useful and consistent data collection methodologies, categories, and terms should be developed. The Federal Government should provide private industry with "official information" to assist in developing an educational program for legislators and other government decision-makers. Finally, the Executive Branch of the Federal Government should establish a top-level commitment to a positive tourism policy. (87 points)

2. The tourism industry needs more equitable treatment under Federal energy policies. Federal policy should support development of alternative forms of transportation such as railroads and mass transit facilities. The Government should consider the impacts of proposed energy contingency plans on the tourism industry and should build in measures to improve policy flexibility and responsiveness to special regional and local conditions under an emergency situation. (87 points)

3. There is a need to create, with the public, a better understanding of tourism's contribution to economic and social well being. (85 points)

4. Federal agencies need a better understanding of the tourism process including how their actions impact the tourism industry. The tourism industry needs to be viewed as a system providing consumer services. At present, various agencies have jurisdiction over components of the industry, each of which contribute a part of the travel service. Regulators need to view the segments of the industry as part of a system to recognize that their actions will affect the system beyond just the segment they regulate. In addition, tourism consumer services need to be packaged in ways that may cut across several agencies' jurisdictions. (78 points)

5. The Federal Aviation Act of 1958 and Civil Aeronautics Board (CAB) regulations and procedures should be reviewed and modified. Some deregulation of the airline industry should be undertaken. The CAB should develop greater consistency in its rulings, and should put more emphasis on tourism impacts in

reaching regulatory decisions. Mechanisms should be developed to ensure tourism industry inputs to CAB policy development and to achieve greater cooridnation between the CAB and other Federal regulatory agencies. Finally, the CAB should allow the mixing of charter and non-charter passengers on the same aircraft to produce higher load factors and consequent lower fares for all. (78 points)

6. The Federal Government needs to place more emphasis on promoting the United States as a travel destination overseas. Tourism needs a higher priority in international economic policy. Less emphasis should be placed on regulation that affects international visitors. (77 points)

7. A larger budget for the U.S. Travel Service (USTS) is needed, and better coordination is needed between USTS and the U.S. Information Agency (USIA) to insure that existing funds are more usefully employed. (77 points)

8. The planning process of public land agencies should attempt to achieve a better balance of facilities to meet different public needs and should allow for growth at popular visitor sites. (73 points)

9. More interaction is needed between Federal agencies that regulate tourism-related activities and those that promote tourism. (73 points)

10. A review is needed of all Federal agencies that impact tourism to consolidate and/or eliminate existing programs to make more sense out of the Federal involvement in tourism. (73 points)

11. Federal contracts for recreational development on public lands inhibit financing of projects. (72 points

12. Public land agencies appear to be trying to serve the national interest in natural resource conservation by making natural resources unavailable to the public. Natural resources should be conserved by permitting a sensible use of the resources. (72 points)

13. The Federal Government should emphasize tourism in economic development and employment opportunity programs. (72 points)

14. The Federal Government should streamline port-of-entry procedures (i.e., immigration, customs, etc.) and improve international visitor services (i.e., foreign language assistance, travel information, money exchange, etc.). (72 points)

15. A uniform tourism promotion policy is needed through all U.S. international offices (all agencies). (70 points)

16. The need exists for more consistent Federal tourism programs and greater continuity in Federal policies so that states can effectively plan their programs. (70 points)

17. The tourism industry needs better industy liaison in Washington, D.C., to improve communications. (68 points)

18. Customs officers of the Bureau of Customs need better training in the treatment of foreign visitors to improve the image of the United States among foreign nationals. In addition, Customs officers should have greater foreign language capabilities in order to streamline foreign visitor clearance procedures. (68 points)

19. The Department of the Interior and other public land agencies need to be more sensitive to regional needs. (67 points)

20. The Federal Government needs to rationalize conflicting laws, regulations and policies. (67 points)

21. The Department of the Interior and other public land agencies need to improve access and develop more lodging facilities on public recreational lands. (65 points)

22. USTS international offices need to be more effectively operated. (65 points)

23. Federal agencies overseas need to establish greater coordination ln promoting the U.S. as a travel destination for foreign visitors. In addition, State Department officers and trade development officers of the Department of Commerce overseas should accord tourism a higher priority. (65 points)

24. U.S. embassies and consulates abroad should be better funded and staffed to increase the efficiency of nonimmigrant visa approval procedures for foreign visitors to the United States. (65 points)

25. National parks legislation needs a drastic overhaul to correct the current lack of pragmatism that limits visitor facility development and to improve the siting of facilities in national parks. (63 points)

26. The Federal Government should reinstitute in-transit customs clearance. (62 points)

27. USTS should *not* promote specific sites domestically, but should promote the United States more effectively in international markets. (62 points)

89-959—77——10

28. Federal agencies need guidance on planning to accommodate visitors and need to develop more facilities to serve the broader interests of the public. (60 points)

29. The Civil Aeronautics Board should review airline fares to realign cost per mile more equitably. (60 points)

30. The Federal Government needs to promote the use of public land resources more effectively by developing more useful and appropriate informational materials for the public. (58 points)

31. Federal agencies involved in tourism should develop higher standards for employee selection and provide more stability in top agency jobs. (58 points)

32. The Civil Aeronaitics Board should reinstitute group fares. (58 points)

33. Interstate Commerce Commission regulations are out of date and need to be reviewed to see if some reduction of restrictions is possible. (57 points)

34. U.S. territories need to be included in USTS and USIA international programs. (55 points)

35. A commitment is required at top levels of the Federal Government to improve (through education) the attitudes of Federal, state and local government employees toward international visitors. (55 points)

36. USTS should promote multi-state regions as travel destinations. (55 points)

37. Public land agencies need to provide for regional differences in recreational needs. (53 points)

38. Competition between Federal agencies needs to be eliminated. (52 points)

39. The Federal Trade Commission should allow for inputs from the tourism industry in formulating agency policies and procedures. (52 points)

40. There is a lack of complete acceptance of the national interests in tourism as defined in the Phase I report of the National Tourism Policy Study prepared by Robert Nathan Associates, Inc. The extent of the national interests in tourism should be further examined during subsequent stages of the National Tourism Policy Study. (50 points)

41. There is a need for greater coordination between the Federal Government and state governments in the development of outdoor recreational facilities. Greater equity should be introduced into the allocation of Federal funds for the development and operation of state parks by basing such allocations on the current and potential number of out-of-state users of such parks. (50 points)

42. The Civil Aeronautics Board should coordinate the assignment and scheduling of international flights with USTS. Similar coordination on the scheduling of Customs and Immigration officers should be undertaken between USTS, the Bureau of Customs, and the Immigration and Naturalization Service. (50 points)

43. Federal support is needed to ease the difficulties of financing tourism facility development. (48 points)

44. The Federal Government needs to review its Western Pacific tourism policy. Asian gateways to the United States have been neglected in development and promotion programs. (40 points)

45. Efforts are needed to balance travel during peak and off-peak seasons. Local school districts should be encouraged to change to an all-year schedule to assist in balancing seasonal travel. (38 points)

46. USTS needs to expand its official presence and the number of its overseas offices in major foreign tourism markets such as Australia which lack USTS representation. (35 points)

San Francisco Regional Meeting

(Team Two)

NEEDS AND RECOMMENDATIONS [1]

1. A program of research and education is needed to create an awareness of the importance and value of the tourism industry at all levels of government. (100 points)

2. Federal research is needed to produce stronger, more extensive, and more credible tourism data. (100 points)

3. The Federal Government needs to support the development of research data that has national comparability and is useful to states, cities and industry for their own planning and decision-making. (100 points)

---

[1] Point scores for the top fifteen needs and recommendations were calculated for Team Two.

4. Greater continuity should be introduced into Federal programs. State and local officials, as well as officials in the private sector, frequently find it difficult to predict from one day to the next the manner in which Federal policies and program emphasis may be altered. The discontinuity in Federal policies and programs makes it extremely difficult for officials to effectively plan long-term tourism development and promotion programs. (100 points)

5. Future Federal energy programs need to recognize tourism as an essential industry. (100 points)

6. Public understanding of the value of tourism needs to be improved through education. (100 points)

7. Federal officials lack an understanding of the importance of tourism. In particular, a need exists to educate Federal officials concerning the value of tourism as a labor-intensive industry contributing substantially to growth in employment. (100 points)

8. Federal officials have "tunnel" vision. The need exists for a rationalization of current Federal involvement, not another "superagency". (100 points)

9. The general public's understanding of the value of travel needs to be broadened. In particular, young people need to be educated concerning the value and dimensions of travel. (100 points)

10. Professional versus politically-oriented leadership is needed at the U.S. Travel Service (USTS). (100 points)

11. Top-level Federal officials need to stress the importance of tourism to Federal agencies. (100 points)

12. The Federal Government needs to establish procedures to reduce conflict, improve coordination and eliminate time delays in decisionmaking among Federal agencies with tourism programs. (80 points)

13. The Federal Government needs to play a leadership and coordinating role for the tourism industry. An agency or office is needed in Wash ington, D.C., to serve in a liaison and coordinating capacity for tourism education, research and promotion. (80 points)

14. Federal tourism promotion programs should be directed only to the international market. (80 points)

15. Federal officials need to develop interest, knowledge and enthusiasm for promoting international conventions in the United States. (80 points)

16. The tourism and travel industry needs to gain public respect by developing an improved image as the catalyst in serving and meeting the needs of people who travel, visit, do business and recreate.

17. A "warning system" should be developed to indicate the impact of Federal programs on the toruism industry.

18. Officers of the Immigration and Naturalization Service and the Bureau of Customs need to improve their attitudes and behavior towards foreign visitors.

19. National Park Service and U.S. Forest Service policies are frequently a constraint on tourism development.

20. The Federal Government needs to revise time-consuming and expensive Federal regulatory procedures such as environmental impact statement preparation procedures.

21. Federal agencies need to develop better coordination and vertical communications with state and local officials. Federal agencies involved in tourism often appear paternalistic and unresponsive to needs at the state and local level.

22. The Federal Government needs to assist the tourism industry rather than simply regulate it. The Government should develop better coordination of existing regulations rather than impose additional regulations.

23. Federal regulation of the industry often conflicts with the objectives of Federal funding programs for development and promotion of the industry.

24. A Federal agency or department is needed that can help cities, states and private industry to deal with other Federal programs.

25. Federal impact analyses provide a "pecking list" for opponents of programs and lead to endless conflict and litigation. There is a need to establish timetables for regulatory approvals and to expedite the approval process.

26. Federal agencies can't arrive at compromises over program objectives and program conflicts.

27. A Federal mechanism is needed that sets priorities, resolves conflicts and arrives at compromises on issues of program emphasis and tourism resource allocation in the industry.

28. Federal land agencies need to revise policies and programs which restrict some recreational and tourism-related activities.

29. The Federal Government should not involve itself in domestic travel promotion; states and cities should undertake this responsibility.
30. USTS needs to rationalize and step up its international promotion efforts. States and cities can then compete for their market share of international visitors.
31. The Bureau of Customs should plan for the adoption of new, more efficient customs-clearance procedures in the future as the number of foreign visitors to the United States continues to increase. The in-transit customs preclearance program should be expanded.
32. Conflicts among interests within the travel industry need to be alleviated to reduce industry fragmentation.
33. Domestic travel data needs to be more easily available to public and private sector officials.
34. Policies of the Department of Housing and Urban Development should be revised to permit the use of urban renewal block grants for tourism-related projects.
35. The Civil Aeronautics Board (CAB) decisionmaking process needs to be streamlined.
36. USTS is underfunded.
37. Department of Transportation highway signing regulations should be made less restrictive.
38. The Federal Government should make a greater commitment to development of an improved national rail system and surface mass transportation facilities.
39. A Federal commitment is needed to improve the Amtrak system which is in a "helluva mess."
40. The trend towards removal of concessions from national parks and other public domain lands needs to be reversed.
41. Restrictive aspects of U.S. Forest Service ski facilities development programs should be revised.
42. The political clout of the tourism and travel industry needs to be increased.
43. The U.S. Forest Service should give the same priority to tourism development as it does to timber management on U.S. Forest Service lands.
44. Greater flexibility should be introduced into land-use programs designed to conserve natural resources.
45. There is a need to revise restrictive aspects of the National Wilderness Preservation Act which prevent greater tourism resource development.
46. Greater coordination needs to be achieved among the many levels of government imposing regulations on the tourism and travel industry.
47. There is a need to alter Federal land-management policies which result in too much land being held in a nonproductive state.
48. The Bureau of Outdoor Recreation (BOR) should allow states greater flexibility in the use of matching-grants provided through the Land and Water Conservation Fund.
49. There is a need to alter a bias towards rural development in BOR's allocation of matching-grants under the Land and Water Conservation Fund.
50. BOR's planning process should encompass other aspects of the tourism field besides outdoor recreation and natural resource management (e.g., tourism services and facilities development).
51. Short-term Federal emergency energy programs disrupt long-range planning efforts in the tourism and travel industry; the Federal Government needs to develop greater continuity in its policies and programs.
52. Economic Development Administration funding programs should be revised to avoid conflicts with private sector efforts in the small business field.
53. Federal development funds should be allocated in such a way that they do not compete with private capital, encourage inefficiency, or subsidize inefficient operators in the tourism industry.

National Meeting—Surface Transportation Executives

NEEDS AND RECOMMENDATIONS [1]

1. Federal Energy Administration emergency energy allocation planning needs to be sensitive to travel industry needs and requirements. (87 points)
2. The Federal Government should coordinate efforts with the private sector to plan strategies for development of mass transportation facilities designed to transport large numbers of people under future energy constraints. (84 points)

---

[1] Rankings for the Surface Transportation Executives' Meeting were developed on the basis of participants' responses to the follow-up questionnaire.

3. There is a need for the development of systematically-planned nationwide intermodal transportation systems (including supporting services such as terminals; completion of the interstate highway system and access roads; and a national public transportation system. (81 points)

4. There is a need for Federal support and guidance, in concert with private industry, of development of intermodal transportation systems (including funding, technical assistance, research and political leadership). (81 points)

5. There is a need to improve the present poor image of pleasure-oriented tourism among government leaders and the general public; in particular, there is a need to educate the public concerning the essential nature of the tourism and travel industry. (80 points)

6. There is a need to overcome a general bias against the tourism and travel industry among government officials through education concerning the economic and social importance of tourism and travel. (80 points)

7. The Federal Government should support research and development programs to devise innovative ways of transporting people with lower per capita energy consumption. (78 points)

8. Federal programs are needed to encourage less energy consumption for commuter travel, either through reductions in per capita consumption or through overall reductions in commuter travel. (75 points)

9. There is a need to broaden the public understanding of travel and the travel industry beyond the narrow confines of "tourism" as it is gnerally considered. (75 points)

10. The need exists to improve the awareness and responsiveness of Federal officials concerning the interdependence of different transportation modes, their interrelated needs, and the increasing need for greater development of intermodal transportation systems. (75 points)

11. The need exists to revise and/or relax Federal regulatory restrictions which have a dampening effect on the growth of travel (including Civil Aeronautics Board regulations; customs and immigration procedures; Federal Energy Administration emergency energy allocation procedures, etc.). (73 points)

12. Highway signing under the restrictive provisions of the Highway Beautification Act as administered by the Federal Highway Administration is inadequate and misleading, both for effective promotion of tourism businesses and for fulfilling consumers' needs for information on available services. (73 points)

13. Interagency coordination at the Federal level on matters pertaining to travel and transportation needs to be vastly improved. (71 points)

14. There is a need for a "travel impact statement" requirement for Federal agency activities and programs with potential impacts on the transportation industry. Such an impact study requirement would include intermodal impacts. (68 points)

15. Federal financial and/or technical support is needed for the development of more comprehensive and up-to-date research data on transportation patterns and needs. (68 points)

16. Federal support is needed for removal of state regulator barriers which restrict interstate bus travel. (68 points)

17. There is a need to revise current Civil Aeronautics Board charter and fare regulations which have a dampening effect on domestic air travel while stimulating travel abroad. (66 points)

18. U.S. visa requirements need to be relaxed where possible to stimulate the growth in foreign visitors to the United States. (65 points)

19. Proposed legislation establishing a water-user charge for all domestic waterway traffic should not be passed without exempting passenger river boats operated as recreational attractions. (65 points)

20. The 55 mile-per-hour speed limit needs to be lifted to permit operation of inter-city buses at maximum efficiency. (64 points)

21. Federal support is needed for dissemination of basic, useful information to consumers on how to travel and how to overcome problems encountered while traveling (to overcome the fear of traveling among many segments of the general public). (62 points)

22. Federal support is needed for upgrading and expanding reception services for foreign visitors to the United States, including interpreters, currency exchange facilities, travel information centers, etc. (62 points)

23. Funds allocated to the U.S. Travel Service for domestic tourism purposes should be channeled into research, coordination, education and development rather than promotion of domestic tourism. (59 points)

24. The need exists for Federal support to overcome the lack of coordination among the various segments of the travel industry. (58 points)

25. There is a need to develop one-stop tour charters (OTC's) which include all parts of the transportation network (railway, bus etc.) and thus offer a complete package for the visitor. (58 points)

26. The Federal Government needs to support an expanded Federal role in the promotion of the United States in international tourism markets. (55 points)

27. Federal support is needed for greater research into the motivations of non-travelers and for dissemination of the results of such research to assist promotion programs aimed at encouraging the non-traveler to travel. (55 points)

28. Federal regulation of travel and the transportation industry needs to be reduced and simplified. (54 points)

29. The Federal Government should examine France's national transportation policies as background for formulating an effective national transportation policy in the United States. (53 points)

30. The Federal Government and private industry need to work in concert to explore ways of assisting the economically deprived to travel. (53 points)

31. Federal support is needed for more research on the motivations and behavior of travelers and tourists. (51 points)

National Meeting—Air Transportation Executives

NEEDS AND RECOMMENDATIONS

1. Tourism lacks recognition as a major national industry. There is a need for the Federal Government to create through education and promotion an awareness of the economic and social importance of the tourism and travel industry among government officials and the general public. (75 points)

2. The U.S. Travel Service (USTS) should be better funded to support an increased staff and better facilities for international promotion of travel and tourism to the United States. (65 points)

3. Federal energy contingency planning needs to reflect an understanding by Federal energy officials of the significant economic development benefits accruing from continued growth and expansion of the travel and tourism industry. (57 points)

4. There is a need to revise current Civil Aeronautics Board (CAB) regulations on discount fares proposed by domestic air carriers to stimulate greater domestic air travel. (49 points)

5. There is a need to step up funding and levels of program activity for promotion of international travel by the Federal Government. (47 points)

6. The need exists to increase the number of customs inspectors at international airports to provide faster customs inspection for international visitors. (45 points)

7. Federal funding and/or technical support is needed for establishment of Foreign Visitor Information Centers and other foreign visitor services in all parts of the country. (45 points)

8. The need exists for a single Federal coordinating office or agency through which representatives of the private sector can register problems and complaints and deal with the various "special interest" Federal agencies involved in tourism and travel. (45 points)

9. There is a need for greater coordination among the numerous travel-related Federal programs. (44 points)

10. Federal support is needed for development of new mechanisms and procedures to facilitate international travel to and within the United States. (43 points)

11. The Federal Government is too "liberal" and supportive of foreign carriers in granting domestic air rights through bilateral air agreements with foreign governments. (43 points)

12. Present Federal noise pollution retro-fit regulations are inflicting inordinate costs on the airline industry. It is less costly to replace existing aircraft than modify existing aircraft to conform with the regulations. (41 points)

13. There is a need to revise Civil Aeronautics Board regulations which force the airlines to operate at inefficient load factors and thereby defeat the goal of maximizing fuel efficiency in domestic airline operations (e.g., regulations disallowing mixing of charter and noncharter passengers on the same flight). (39 points)

14. The Federal Government needs to exert greater negotiating pressure on foreign governments to reduce or remove operating restrictions imposed on U.S. flag carriers. (37 points)

15. The need exists for consolidation of international tourism promotion efforts into a single agency. (36 points)

16. Federal support is needed for quality control of travel agencies by the private sector of the travel industry. Federal licensing of tour operators and travel agencies is not desirable. (36 points)

17. The Federal Government needs to explore possible expansion of the customs preclearance program to major foreign visitor markets other than Canada. (35 points)

18. The role of USTS in promoting domestic trourism needs to be expanded. (33 points)

19. There is a need to relocate USTS foreign offices to locations which are more easily accessible for potential foreign visitors to the United States. (32 points)

20. The need exists to combine the multiple foreign visitor clearance procedures at ports-of-entry into a single-stop procedure. Also, there is a need to step up the level of facilities and personnel. (32 points)

21. Visa regulations are a deterrent to foreign travel to the United States; there is a need to eliminate nonimmigrant visa requirements for visiting nationals from some nations with reciprocal privileges for U.S. citizens. (31 points)

22. Federal support is needed for development of required infrastructure to service an increasing flow of foreign visitors in the coming years. (30 points)

23. Customs and immigration procedures at the Canadian and Mexican borders are frequently time consuming and offensive; there is a need to improve the efficiency of procedures and the attitudes of Federal officials. (29 points)

24. Greater Federal funding is needed to support more extensive development of airport facilities, national park services and facilities, etc. (26 points)

25. Federal financial and/or technical support is needed for establishment of domestic travel information centers in major cities. (26 points)

26. Federal agencies involved in domestic and international promotion of the United States need to agree on explicit criteria for allocating funds and staff effort between domestic and international travel promotion. (26 points)

27. The need exists for an increase in Federal matching-funds available for domestic tourism development and promotion by state and local public and private sectors. (26 points)

28. Present customs inspection procedures are too tight and inflexible (24 points)

29. Federal energy agencies need to focus greater program efforts on research and development of alternate sources of energy. (24 points)

30. Federal support is needed to avoid piecemeal and conflicting regulation of travel agencies by individual states. (22 points)

31. Federal support is needed for research on the motivations and fears of non-travelers. (22 points)

32. The Federal Government needs to support and/or directly undertake research and development programs aimed at developing alternative aircraft engines using alternative fuel sources. (20 points)

33. The effectiveness of the activities of the Department of Transportation's Office of Facilitation needs to be improved. (19 points)

34. Domestic airlines should be permitted greater freedom by the CAB to pursue their own fare-setting arrangements in order to meet the travel needs of various types and classes of passengers while, at the same time, operating at maximum efficient load factors. (19 points)

35. Federal efforts are needed to relieve the problem of overcrowding and overuse of national park facilities through control of visitor access, expansion of facilities, promotion of less heavily-visited areas, etc. (18 points)

36. USTS and the U.S. Information Agency (USIA) need to clarify and coordinate their respective roles in international promotion of travel to the United States. (18 points)

37. Federal financial and/or technical support is needed for tourism/travel promotion efforts by small air carriers. (18 points)

38. U.S. flag carriers should have access to names of foreign visa applicants at U.S. embassies and consulates abroad for promotional purposes (similar to the practices of foreign governments vis-a-vis their own national airlines). (17 points)

39. The need exists for revision of current CAB regulations on flight scheduling and air charters to reduce energy waste and permit airlines to maintain efficient load factors (by mixing charter and non-charter passengers on the same aircraft). (17 points)

40. The Federal Government needs to exert greater negotiating pressure on foreign governments to remove foreign restrictions on the import of promotion materials designed to stimulate travel to the United States. (14 points)

41. Need to remove approval requirements for ownership of tour wholesaler operations by U.S. carriers; such requirements put U.S. flag carriers at a competitive disadvantage vis-a-vis foreign carriers. (13 points)

42. USIA needs to establish a section or department concerned solely with tourism promotion. (10 points)

43. There is a need to establish consistency in customs and immigration clearance procedures and behavior of officials at different ports-of-entry into the United States. (10 points)

44. There is a need to develop greater coordination and cooperation between the Bureau of the Customs and the Immigration and Naturalization Service. (9 points)

45. There is a need for Federal research into exemplary foreign national tourism programs as well as state tourism programs within the United States. (7 points)

National Meeting—Public Interest Group Representatives

NEEDS AND RECOMMENDATIONS

1. There is a need to centralize and coordinate Federal tourism programs and information on such programs in order to rationalize the Federal involvement in tourism and, in addition, fix clearly the responsibility for particular government activities in the tourism field with the Federal agencies involved. (88 points)

2. The Federal Government needs to produce and disseminate more extensive and useful information to the general public on the full range of tourism opportunities available for all economic levels of the population. This also includes the need to promote the diversity of tourism experiences for different groups. (75 points)

3. A more extensive research data base is needed on tourism facility requirements at local levels to provide the basis for more effective local tourism resource planning and development. Also, there is a need for better availability of information on such local facilities for consumers. (75 points)

4. A Federal clearing house or "ombudsman-type" agency is needed to receive consumer complaints and provide Federal action to satisfy them. (75 points)

5. Federal agencies should coordinate efforts with the private sector to make directly available to potential foreign visitors in overseas markets more entensive and useful consumer information on travel and tourism in the United States. The U.S. Travel Service (USTS) is currently too "trade" versus "consumer" oriented in its promotional activities. (73 points)

6. The Federal Government is failing to sufficiently consider the recreational needs of the poor. The Government needs to support more actively the development of recreational facilities adjacent to municipal areas which will be easily available for use by lower-income groups. (73 points)

7. Visitor centers, should be established at each of the Federal agencies with tourism-related programs in order to improve visitor access and provide an understanding of the inner workings of these agencies. (73 apoints).

8. Federal coordination is needed of existing research activitie sin the tourism field to reduce duplication and ensure that research is oriented towards developing solutions to the industry's problems. However, the Federal Government should not undertake research that state and local public and private sector officials can manage by themselves. (73 points)

9. Federal support is needed for upgrading the quality and uniformity of tourism services and facilities. In particular, Federal guidelines should be developed for quality and uniformity of services. Also, there is a need for better interstate packaging of domestic tourism services to better meet domestic consumer needs. (70 points)

10. USTS and the U.S. Information Agency (USIA) need to improve the effectiveness of their overseas travel promotion activities. (70 points)

11. More efficient customs and immigration procedures are needed to facilitate international visitor traffic. (70 points)

12. There is a need to develop better public mass transit access to national parks. The saturation problem at national parks is a result of too many *automobiles*—not too many *people*. (68 points)

13. The Federal Government should support and coordinate tourism planning on the part of state and local planners in both the public and private sectors. (68 points)

14. There is a need for better coordination among Federal public land agencies, state and local governments, and, where relevant, the Department of Transportation, to ensure adequate public access to Federal parklands (e.g., use of municipal buses and school buses on weekends, etc.). The National Park Service has no authority to stimulate development of better access facilities by itself. (68 points)

15. Federal support is needed for development of more effective and responsive legal and institutional mechanisms for consumer redress on travel/tourism complaints and problems. In particular, there is a need to revise regulations protecting some segments of the industry from legal liability in connection with consumer complaints (e.g., consumers cannot sue air carriers in small claims court if the airlines lose their baggage enroute). (65 points)

16. The Federal Government should establish clear criteria for balancing the "use" (i.e., development) and "protection" (i.e., conservation) objectives of the National Parks Act (1916 Organic Act) with respect to maintenance and development of national parks and other public lands. (65 points)

17. There is a need for more detailed, accurate, and reliable consumer information in travel promotion materials in the public and private sectors (e.g., cost breakdown on tour packages, etc.). (65 points)

18. Research should be undertaken on the tourism programs of foreign countries (France, Italy, Canada, Japan) to avoid making the same mistakes these countries have made in development of their national tourism programs. (63 points)

19. The National Park Service should be better funded to ensure adequate development and staffing of visitor services and facilities in the national parks (60 points)

20. Continued Federal support is needed for expansion of inter-city rail transportation through Amtrak. The current procedure for annual approval of Amtrak subsidies by Congress suggests the lack of a full-force, long-term commitment. (60 points)

21. An independent committee or agency should be established to review Federal tourism programs and assess the impact of Federal agency activities on the tourism and travel industry. (60 points)

National Meeting—Lodging Executives

NEEDS AND RECOMMENDATIONS

1. The Federal Government needs to recognize the tourism and travel industry as essential to the national economy. (97 points)

2. There is a need to educate Congress, Federal agencies involved in tourism activities, and the general public on the dimensions of the travel and tourism industry and the essential nature of the industry. There is the need, in addition, to emphasize that business is a large component of travel and tourism. (91 points)

3. A National Tourism Policy should be implemented by a Cabinet Officer; the tourism and travel industry needs a strong, top-level advocate in the Federal Government. (89 points)

4. The tourism and travel industry needs to overcome fragmentation and organize itself to improve its political influence at Federal, state and local levels of government. (84 points)

5. Federal agencies involved in tourism need more accurate and detailed informational inputs from the tourism and travel industry on industry needs and requirements. This is particularly so for Federal energy agencies. (83 points)

6. Minimum wage laws should be revised or abolished to permit the tourism and travel industry to hire more unskilled or low-skilled workers and thus contribute to a reduction in the national unemployment problem. (82 points)

7. Institutional mechanisms need to be established to ensure continuing inputs from the private sector of the tourism and travel industry during consideration and formulation of Federal policies, programs and regulations. (81 points)

8. A White House Conference on Tourism should be organized bringing together all segments (public and private) of the tourism and travel industry to highlight the significance of the industry and the need for a more responsive Federal role. (81 points)

9. There is a need for continuity in Federal energy policy and for advance notice by Federal energy agencies of proposed future changes in energy policy and the likely impacts of such changes on the industry. (80 points)

10. Conflicting regulations in a number of Federal agencies frequently make compliance difficult or impossible for the private sector of the tourism industry (e.g., Federal Energy Administration versus Occupational Safety and Health Administration; Department of Labor versus Internal Revenue Service on the meal tax credit allowed against employees' wages, etc.). (76 points)

11. There is a need to establish a Cabinet-level Secretary of Travel and Tourism to provide the travel and tourism industry with sufficient representation in the Federal Government. (75 points)

12. U.S. Travel Service (USTS) international promotion programs need to be better funded. (75 points)

13. The level of per capita or per visitor funding for international tourism promotion programs of the Federal Government (based on current and potential levels of international visitor traffic) should be equal to or greater than per capita funding by foreign governments for their national tourism programs. (75 points)

14. USTS needs to step up its domestic promotion of the United States as a desirable travel destination for Americans. (75 points)

15. Federal tourism programs need to be consolidated into a single agency. (72 points)

16. The Federal Government needs to coordinate private sector and state/local public sector statistical research efforts to produce more reliable, accurate and usable statistical data for the industry. (72 points)

17. Highway signing regulations under the Highway Beautification Act are too restrictive and have a particularly strong negative impact on small businesses in the tourism industry. The regulations should be revised and the Department of Transportation should stimulate an increase in directional signing using universal symbols. (72 points)

18. There is a need to revise Federal Government regulations impacting on tourism development which discourage new capital investment in the industry by delaying or actually halting investment projects. (70 points)

19. The Federal Government should support industry efforts to prevent non-profit institutions such as universities from entering into the lodging business and unfairly competing with profit-making operations. (68 points)

20. USTS should step up efforts to promote international group travel to the United States for conventions, trade shows, sporting events, etc. (68 points)

21. The importance of the food service industry to the national economy needs to be impressed on government officials and the general public. (68 points)

22. The recent Internal Revenue Service ruling restricting deductions allowable for travel expenditures associated with international conventions should be revised. (65 points)

23. The Federal investment tax credit should be increased to stimulate greater development in the tourism and lodging industries. (65 points)

24. The Occupational Safety and Health Administration (OSHA) fails to take into account special problems and requirements of the lodging industry when formulating and applying regulations. (64 points)

25. The role of the tourism industry (and, in particular, the lodging industry) as a major provider of part-time employment opportunities needs to be better understood by Federal officials. (64 points)

26. The Federal Government needs to cooperate and coordinate more fully with the private sector of the tourism industry in developing useful research data for planning, development and promotion. (64 points)

27. There is a need to expand U.S. promotional representation overseas and provide better information on U.S. travel opportunities for potential international visitors. (64 points)

28. The Federal Government should support promotional efforts to generate more foreign visitors to the United States as a means of stimulating greater domestic job creation. (64 points)

29. Federal support is needed to educate the general public on the lodging industry's "no-show" problem and ways in which the public can help to alleviate this problem. (63 points)

30. There is a need to improve the efficiency of foreign visitor clearance processes at ports-of-entry. (62 points)

31. The Federal Government should undertake a direct role in the develop. ment and operation of multi-language visitor centers to facilitate international visitor traffic. (62 points)

32. The Environmental Protection Agency needs to streamline its regulatory procedures and develop greater sensitivity to problems of the tourism and lodging

industries in the application of regulations. Current regulatory procedures delay tourism development and drive up the cost of new investment projects. (61 points)

33. The Federal Government should expand its international role in marketing the United States as a tourism destination. (61 points)

34. Government officials and the general public need to be educated on the significant contribution tourism and travel make to the quality of life. (61 points)

35. Federal and state franchise laws need to be simplified to prevent a restricting effect on continued expansion of the lodging industry to meet growing consumer demands. (60 points)

36. There is a need to expand Federal financial and/or technical support programs for development projects in the tourism and lodging industries. (59 points)

37. There is a need to eliminate the double taxation of dividends by the Federal Government. (59 points)

38. Better funded, more effective Federal international facilitation programs are needed (foreign visitor services, language assistance, etc.). (59 points)

39. The Federal Government should subsidize tourism job-training programs to improve the skills of unskilled or low-skilled workers and reduce unemployment. This would represent a positive contribution to alleviating U.S. economic and social problems. (54 points)

40. Federal support is needed for increasing the use of universal travel symbols in the United States. (54 points)

National Meeting—Labor Representatives

needs and recommendations

1. There is a need for Federal review of the provisions of the Mutual Aid Pact among U.S. domestic airlines. Airline industry strikes have been prolonged in the recent past by the existence of this agreement. (89 points)

2. Further deregulation of the airline and railroad industries should not be undertaken by the Federal Government. Deregulation would result in a loss of service to small communities and a consequent loss of jobs in the tourism and travel industry. (87 points)

3. The regulatory procedures of the Civil Aeronautics Board need to be streamlined and the CAB needs to be more responsive to airline industry needs (e.g., in the past the CAB has been too slow in approving needed fare increases in the industry.) (87 points)

4. The Taft-Hartley Act needs to be amended to render inoperative the current Federal Court interpretation of the "successorship doctrine" which permits the abrogation of prior collective bargaining agreements when a tourism property changes ownership. (87 points)

5. U.S. energy policies (in particular, emergency energy allocation procedures) need to be formulated with full consideration given to the impact of such policies on employment in the tourism industry. (87 points)

6. Appointments to the CAB should be based on professional ability rather than political considerations. (84 points)

7. The need exists for a National Transportation Policy which will encourage development of coordinatcd nationwide intermodal transporation systems. (82 points)

8. The Department of Labor needs to coordinate with the private sector of the tourism industry (unions and corporations) in developing joint government/industry job-training programs for low-skilled workers, minority groups, etc. (82 points)

9. The U.S. State Department, CAB and other Federal agencies need to support U.S. industry interests more vigorously in negotiations on international agreements for aircraft landing, rights, fuel charges, the current renegotiation of the Bermuda Agreement, etc. (80 points)

10. Conflicts between Federal programs designed to promote tourism and Federal regulatory programs which have a restricting influence on growth in the tourism industry need to be eliminated. In particular, Federal regulatory programs should be reviewed to find ways to support capital investment in the tourism and travel industry. (78 points)

11. Federal financial support is needed for more job training of tourism hosts and guides. This includes the training of urban transit personnel as guides, the training of personnel for foreign visitor facilitation services, etc. (78 points)

12. Federal officials need to be educated concerning the importance of the tourism and travel industry to the national economy and employment in the United States. (78 points)

13. Federal support is needed for research to establish accurately the inexpensive cost of job creation in the tourism industry (e.g., research to establish the average cost of creating one additional job in the industry). (75 points)

14. The U.S. Travel Service (USTS) needs to find more effective and innovative methods for promoting the United States as a travel destination both domestically and internationally. For example, USTS should promote greater package and group tours with a particular slant or appeal such as educational tours for particular segments of the private sector. (73 points)

15. USTS needs to promote travel on U.S. flag carriers more effectively; the Agency has responsibility for such promotion but efforts have been insufficient. (73 points)

16. Federal support is needed for more extensive statistical research on capital investment needs of particular segments of the tourism and travel industry and the causal relationship between capital investment and generation of jobs in the industry. (71 points)

17. USTS needs to develop mechanisms for soliciting on an ongoing basis the inputs of labor representatives in developing promotion strategies. (69 points)

18. The Federal Maritime Administration should increase financial incentives available to the private sector for development of U.S. cruise ships. (69 points)

19. Better coordination is needed between the Department of Commerce, Department of Labor, the Treasury Department, and Congressional committees on programs to stimulate the growth of jobs in the tourism industry. In addition, the Senate Commerce Committee should consult with the Labor and Unemployment Committee during the course of the NTPS. (69 points)

20. The National Tourism Policy Study should solicit inputs from the Southern Railroad, the Denver and Rio Grande Railroad, and Autotrain concerning the potential impacts of deregulation on the railway industry. (67 points)

21. There is a need to retain cabotage laws which restrict foreign flag cruise ship traffic in U.S. coastal waterways to protect the future potential of the U.S. flag cruise ship industry. (67 points)

22. Amtrak and other passenger railroads need greater support from the Association of American Railroads. (64 points)

23. The Urban Mass Transportation Administration needs to revise its current policies which do not permit urban transit companies to use Federal funds for training bus drivers and other transit workers as tourism guides. (64 points)

24. Federal technical assistance and guidance is needed for the lodging industry in construction and interior design of lodging facilities to better meet the special needs of package tour groups, international visitors, etc. (64 points)

25. USTS needs to undertake greater efforts to promote off-season travel to stabilize jobs in the tourism industry, conserve energy, and encourage greater travel by the general public. (64 points)

26. Federal support is needed for accurate research on the positive economic impact of cultural events and attractions (theater, music, dance, etc.) on the growth of other segments of the tourism and recreation industries. (64 points)

27. USTS should promote greater use of package tours, group travel, and off-peak travel to conserve energy. (64 points)

28. The Federal Maritime Administration needs to undertake better-funded, more effective research and development efforts to promote the growth of U.S. flag cruise ships. (60 points)

29. Amtrak should refrain from fare reductions which lead to unemployment among other over-the-road carriers such as interstate bus carriers. (53 points)

National Meeting—Travel Promotion Executives Needs and Recommendations

1. The Federal Government needs to recognize tourism as a priority concern for the nation, the economy and the well being of the general population. (91 points)

2. The value of tourism and travel to the U.S. economy needs to be better understood by government officials and the general public. (86 points)

3. An administrative entity at the Executive Branch level of the Federal Government is needed which will focus not simply on tourism promotion, but on all aspects of the industry and its problems. Such an entity would act as a "spokesperson" for the industry with both the Executive Branch and Congress. There

is a need, as well, for Congressional entities such as the present Congressional Subcommittees with tourism responsibilities to continue to provide focus for tourism interests. (78 points)

4. The Federal Government needs to take a catalytic and coordinating role in tourism research, planning, development and promotion. (76 points)

5. The job-generating potential of the tourism and travel industry needs to be better understood by government officials and the public. In particular, tourism needs to be recognized as an important industry for achieving the Government's current goals of reducing unemployment and creating economic advancement opportunities for minorities. (76 points)

6. The tourism and travel industry needs better research data on industry trends to assist in future planning. (73 points)

7. U.S. Travel Service (USTS) international promotion programs need to be better funded in order to overcome the current inaccurate image of the United States as a costly destination among potential foreign visitors. (71 points)

8. Tourism and travel needs higher-level representation within the Federal Government; in most other countries the industry is accorded Cabinet-level status. (70 points)

9. Tourism and travel need to be promoted with government officials and the public as an industry rather than as an individual activity. (70 points)

10. The Federal Government needs to undertake a review of all Federal agency activities, policies, statutes, and regulations which impact on tourism and travel. (70 points)

11. More consistent statistical data is needed to accurately define the size and character of the tourism and travel industry. (69 points)

12. Federal officials need to be educated concerning the need for profits to provide future growth for the tourism and travel industry. Because of the current low profitability of the industry, sufficient resources are not being developed to satisfy future demands for high-quality travel services. (66 points)

13. Government officials need to be educated concerning the social values of tourism—such as its contribution to health and education, its positive impact on international understanding and world peace, etc. (66 points)

14. The tourism and travel industry needs to be better defined and conceptualized in its totality as a step to overcoming the current fragmented nature of the industry. (65 points)

15. Government officials need to be shown that the tourism and travel industry is in reality not "fragmented," but is made up of a number of "highly diversified but highly interralated" sectors. (64 points)

16. An annual National Travel Survey is needed to provide a common data base not only for states, local governments and the private sector, but to assist Federal agencies in planning their activities and estimating more accurately the impact of such activities on tourism and travel. (63 points)

17. The potential of conventions and meetings to contribute to the well-being of the economy needs to be better recognized by government officials and the public. (61 points)

18. Federal planning is needed if the tourism and travel industry is to adequately meet new tourism and recreational demands arising from current trends in leisure time expansion. (61 points)

19. The tax burden on the tourism industry needs to be alleviated. Special state and local taxes on the industry are onerous, have a dampening effect on new development, and frequently are not channeled back into the tourism industry. Moreover, the complexity and fragmented nature of such taxes makes industry planning difficult. (61 points)

20. Greater continuity is needed in Federal programs supporting development of new facilities and services in the tourism and travel industry. (59 points)

21. Government officials need to better appreciate the frequently high costs of marketing tourism and travel; government funding of domestic and international promotion programs should be correspondingly increased. (58 points)

22. There is a need for better foreign visitor host facilities and services at port-of-entry cities and in the interior of the United States. The United States needs to consider itself as a "host country" for foreign visitors. (56 points)

23. Federal agencies should be required to prepare a "tourism and travel impact statement" similar to an environmental impact statement assessing the potential impacts on the tourism and travel industry of proposed Federal agency actions and activities. (55 points)

24. There is a need to standardize data categories, definitions and collection methodologies among different Federal agenices involved in travel and tourism research. (54 points)

25. There needs to be more information available to potential foreign visitors overseas on the United States as a country and as a potential travel destination. In support of this, USTS and the United States Information Service (USIS) should coordinate their efforts and develop more effective and innovative techniques for disseminating information (e.g., foreign journalists should be used to educate foreign nations on the potential of the United States as a tourism destination). (54 points)

26. The United States Information Agency (USIA) needs to develop more effective policies and procedures for carrying out its tourism responsibilities overseas. At present, USIS commercial officers in several embassies are according tourism a low-priority status in spite of directives to promote greater foreign travel to the United States. In addition, there is a need to create better public access to USIS facilities by locating them elsewhere than within U.S. embassies and consulates. Also, there is a need to depoliticize USIA activities overseas. (53 points)

27. USTS needs to put more emphasis in its international promotional programs on the promotion of international meetings and events in the United States. (53 points)

28. U.S. representation at international meetings and conferences on tourism and travel needs to be increased and improved. (51 points)

29. Federal regulatory and taxation policies need to be revised to eliminate negative impacts on profitability and capital investment in the tourism and travel industry. These negative impacts are leading to a reduction in the quality of services available to tourists and travelers. (51 points)

30. The National Tourism Policy Study should study the structure and role of the British Tourist Authority in promoting tourism and travel in Great Britain. (49 points)

31. The Bureau of the Census needs to solicit inputs from other Federal agencies involved in tourism concerning what research is presently being undertaken and what the agencies' specific needs are for additional research data. (46 points)

32. Tourism facilities in the United States need to be greatly expanded and improved. The United States is an "underdeveloped country" in terms of the level and quality of services available compared with other developed nations. (45 points)

33. There is a need for Federal recognition of the role and importance of travel agents in the travel and tourism industry. (43 points)

34. The Federal Government needs to provide "lead times" between the public announcement of proposed changes in airiine tariffs and the actual adoption of such new tariffs by air carriers. The period of time should be sufficiently lengthy to enable consumers to be fully alerted to impending tariff changes. (39 points)

35. The United States Information Service should include tourism promotion as one of the objectives of its overseas film program. (36 points)

National Meeting—Attractions and Recreational Activities Representatives

NEEDS AND RECOMMENDATIONS

1. The Federal Government needs to recognize tourism and travel as a priority industry with major economic and social significance for the United States. (98 points)

2. Federal agency activities in tourism and travel need to be consolidated to increase efficiency and eliminate duplication and conflict. (90 points)

3. The Federal Government needs to develop a comprehensive National Energy Policy. (89 points)

4. The travel and tourism industry needs an advocate representative in the Federal Government to coordinate, promote and protect the industry's interests with Federal agencies. (88 points)

5. Top-level leadership within the Federal Government is needed for increasing the priority and significance attached to the tourism and travel industry by Federal officials. (85 points)

6. The travel and tourism industry needs a Federal agency to represent it in dealing with various Federal agencies and programs involved with or impacting on tourism (in particular, Federal regulatory agencies). Such an agency would

act as an informational clearinghouse, a liaison office, a promoter of tourism interests, and a coordinating and planning agent to increase consolidation within the industry. (85 points)

7. Government officials at the Federal, state and local levels need to be better educated concerning the economic impact of the travel and tourism industry on the rest of the economy. (84 points)

8. Travel-related programs within Federal agencies need to be better coordinated to overcome the current fragmentation of program efforts. (82 points)

9. The travel and tourism industry needs to overcome the present fragmented nature of the industry if it is to gain significant recognition among government officials. (82 points)

10. Minimum wage restrictions need to be relaxed to permit greater hirings of youths, low-skilled workers and the unemployed by the tourism and travel industry. (82 points)

11. Federal support is needed for research aimed at discovering new areas and methods for conserving energy.

12. There is a need for a Federal matching-funds program to encourage states to step up their domestic promotion efforts. (81 points)

13. Federal agencies whose activities are likely to impact on the tourism and travel industry should be required to prepare a "travel impact statement" prior to undertaking such activities. (78 points)

14. Federal support is needed for greater generation of useful statistical research data in the travel field. (76 points)

15. Federal agencies with responsibility for direct management of Federal lands need to develop such resource lands as multi-purpose recreational properties. Too frequently, Federal land agencies fail to maximize potential economic benefits and view the value of these public resource lands only in terms of the agencies' own narrow program goals. (74 points)

16. There is a need to exempt the tourism industry from Federal regulations which were originally designed to regulate conditions in other industries but which inadvertently are being applied to the tourism industry with consequent negative impacts. Such bureaucratic actions, insensitively carried out, are ignoring the original legislative intent of such regulation. (74 points)

17. The Federal Government needs to provide emergency support to the travel and tourism industry under conditions of severity or economic hardship in the same fashion that it assists other important industries (e.g., Federal officials have never concerned themselves with the severe impact of "snow drought" on the winter recreational segment of the industry). (74 points)

18. Federal programs for development of public recreational facilities and attractions need to be coordinated with private sector development to avoid unfair competition for the same tourism revenues. (74 points)

19. Cumbersome and lengthy Federal regulatory review processes for approval of tourism development projects lead to costly construction delays—a streamlining of such procedures is needed. (73 points)

20. The tourism and travel industry's poor public image needs to be overcome through education of the general public concerning the benefits and opportunities inherent in travel and tourism. (72 points)

21. Federal support is needed for educating the general public and government officials concerning the social and human values inherent in travel and tourism. (69 points)

22. The Federal Government needs to develop more effective mechanisms for dissemination of consumer information and promotional materials on tourism opportunities in the United States. These could include better equipment for public display of such materials (display racks); local promotional substations where consumers could acquire this material and contact the Federal Government; promotional campaigns aimed at industrial recreation directors, etc. (69 points)

23. Federal support is needed to assist U.S. destinations to become more competitive with foreign destinations in the international travel market. U.S. destinations are currently "out-promoted" by foreign promotional efforts. (69 points)

24. Federal support is needed to provide greater information to consumers concerning domestic tourism attractions in the United States. (68 points)

25. Federal programs are needed to assist the industry to alleviate problems of seasonality (e.g., promotion of winter tourism). (68 points)

26. Federal programs promoting U.S. tourism opportunities in international tourism markets need to increase their visibility among potential foreign visitors to the United States. (68 points)

27. Federal agencies concerned with economic development need to increase their funding priorities for tourism development. (67 points)

28. Federal encouragement is needed for uniformity in school openings and closings to maximize vacation travel and aid the industry in planning operations (67 points)

29. Federal support is needed for promotional programs designed to encourage Americans to take advantage of domestic tourism opportunities and attractions rather than traveling abroad. (65 points)

3. Federal and state restrictions on highway signing based on provisions of the Highway Beautification Act need to be revised and made uniform to permit greater use of informational signs for the benefit of both consumers and small businesses in the tourism field. (64 points)

31. Private recreational facilities should be treated equally with competing public recreational facilities with respect to Federal regulatory requirements and taxation (e.g., Federal campgrounds frequently have less strict development requirements and pay lower taxes than privately-owned campsites). (64 points)

32. The Federal Government, state governments and the private sector all need to promote U.S. travel more aggressively, both with Americans and with potential foreign visitors (e.g., competitive pricing of overseas package tours make domestic package tours noncompetitive). (63 points)

33. A Federal Outdoor Recreation Plan is needed. (63 points)

34. Federal support is needed for more effective energy conservation measures. Past measures have simply shifted travel patterns without leading to any significant reduction in erengy usage. (61 points)

35. The Federal Government needs to be more aggressive in negotiating reciprocal air carrier rights with foreign governments. U.S. flag carriers are already operating at a disadvantage due to foreign government subsidies to foreign national airlines. (61 points)

36. The "counterpart funds" law and P.L. 480 need to be revised to permit use of blocked funds by the U.S. Travel Service (USTS) and the U.S. Information Agency (USIA) for promotion of foreign travel to the U.S. (61 points)

37. Federal regulation of tourism facilities development needs to be rationalized and simplified to alleviate difficulties developers experience in obtaining commercial bank loans due to extensive, restrictive and inconsistent Federal regulations. (61 points)

38. Federal support is needed for more up-to-date, informative maps and guides for the nation's highways, urban areas, etc. (60 points)

39. The Federal Government should *not* promote domestic "site specific" travel. (60 points)

40. There is a need to increase the professional management skills of staff in some public land agencies responsible for direct management of publicly-owned properties. In some cases, there is a current lack of expertise to operate some of these properties. (57 points)

41. The Federal Government needs to provide financial and technical assistance for development of more educational career training programs for individuals interested in career opportunities in the travel and tourism industry. (57 points)

42. Civil Aeronautics Board rulings and regulations need to be revised to alter the current situation where travel overseas is being encouraged by regulations to the detriment of growth in domestic tourism and travel. (55 points)

43. The Federal Government needs to support the development of more port-of-entry cities in the United States. (53 points)

44. Restrictive Federal visa regulations need to be relaxed, where possible, to facilitate international visitor traffic to the United States. (52 points)

45. Greater financial support is needed for renovation and preservation of national historical sites (National Sites and National Landmarks) by both the public and private sectors (including revision of appropriate laws/regulations and upgrading of the National Landmarks Committee). (49 points)

46. U.S. Government foreign aid should be used as an incentive to foreign governments to undertake measures to facilitate and encourage travel to the United States by their citizens. (47 points)

Appendix B

Lists of Participants at the Regional and National Meetings

Boston Regional Meeting

LIST OF PARTICIPANTS

Hadley Atlas, director, State development, State House, Augusta, Maine.
Ernest A. Lucci, deputy commissioner, Massachusetts Department of Communication and Development, Boston, Mass.
Robert Wilcox, public relations, Providence, R.I.
Paul DiNatale, Economic Development Industrial Corp., Mayor's Office, Boson, Mass.
Charles Gillett, president, Convention and Visitor's Bureau, New York, N.Y.
Terrence Fitzpatrick, Buffalo Convention and Visitor's Bureau, Buffalo, N.Y.
Irene McGinnis, economic development director, New England Regional Commission, Boston, Mass.
Joseph Horan, director of travel, State Department of Commerce, Albany, N.Y.
Ted Berns, president, Massachusetts Hotel Motel Association, Boston, Mass.
Lew Cuddeback, president, New York Travel and Vacation Association, Adirondack Park Agency, Lake George, N.Y.
John Horn, acting commissioner, Labor and Industry, Trenton, N.J.
David L. Heinl, president, Greater Hartford Convention and Visitors Bureau, Inc., Hartford, Conn.
John Oliver, assistant manager of tourist programs, Niagara Falls Convention and Visitors Bureau, Niagara Falls, N.Y.
David Balfour, The New England Council, Boston, Mass.
Michael J. Frucci, chairman, Governor's Advisory Committee on Vacation Travel, Hyannis, Mass.
Barnet Laschever, Commerce Department, Hartford, Conn.
Dennis Murphy, director, Department of Natural Resources, Providence, R.I.
Ms. Dorthea Cherington, director, foreign visitor program, Boston, Boston, Mass.
Harold Phillips, Springfield Convention Bureau, Chamber of Commerce, Springfield, Mass.
Jeff Orton, New York State Commerce Department, Albany, N.Y.

Washington Regional Meeting

LIST OF PARTICIPANTS

Steven Hall (Senator Randolph's Office), Charles Town, W. Va.
R. Parker Nelson, executive vice president, Virginia Travel Council, Richmond, Va.
Noel Holmes, Governor DuPont's Washington Office, Washington, D.C.
Robert Rosenberg, marketing division director, State Travel Council, Norfolk, Va.
Paul R. Decker, director, Bureau of Travel Development, Pennsylvania Department of Commerce, Harrisburg, Pa.
William A. Hopkins, manager, technical services section of division of parks and recreation, Department of Natural Resources, Dover, Del.
Robert G. Ling, regional director, Quality Inns, Inc. and vice president of Hotel and Motel Association, Towson, Md.
Foster Mullenex, Governor's Office, Federal-State Relations, Charleston, Va.
Arch Parsons, Appalachian Regional Commission, Washington, D.C.
T. J. D'Arcy, aviation and promotion, Port of Authority of New York and New York Old World, New York, N.Y.

89-959—77——11

Marshall Murdaugh, commissioner of Virginia State Travel Service, Richmond, Va.

A. S. Hornstein, Philadelphia Convention and Visitors Bureau, Philadelphia, Pa.

Chip Ferguson, Baltimore Promotion Council, Baltimore, Md.

Kenneth Wheeler, director, Department of Marketing and International Research, Norfolk, Va.

Conrad Lickle, special assistant for parks and forestry management, Pennsylvania Department of Environmental Resources, Harrisburg, Pa.

Donald R. Mathewson, visitor information office, Division of Economic Development, Dover, Del.

John J. Nelson, director of tourist development, Maryland Department of Economic and Community Development, Annapolis, Md.

Joe Fowler, Department of Commerce, travel division, Charleston, W. Va.

Don Spencer, sales manager, Pipesten State Park, Pipesten, W. Va.

Atlanta Regional Meeting

LIST OF PARTICIPANTS

William Arnold, chief travel, development section, North Carolina Department of Natural and Economic Resources, Raleigh, N.C.

James C. Vernon, commissioner, Kentucky Department of Public Information, Frankfort, Ky.

Ed McNeil, executive director, Greater New Orleans Convention and Tourist Commission, New Orleans, La.

Richard Carlin, manager, Louisvile Visitors Bureau, Louisville, Ky.

Jeff Germany, administrative assistant, mayor's office, City Hall, Birmingham, Ala.

William A. V. Cecil, the Biltmore Co., Asheville, N.C.

Catherine Cobb, Alabama Mountain Lakes Association, Huntsville, Ala.

Lew Price, director, Miami-Metro Publicity Department, Miami, Fla.

Karl L. Cheuvront, deputy commissioner, Kentucky Department of Parks, Frankfort, Ky.

Carl Gibson, chairman, Tennessee Tourism Council, Chattanooga, Tenn.

Douglas O. Benton, director, Alabama Bureau of Publicity and Information, Montgomery, Ala.

William E. Henderson director, Arkansas Department of Parks and Tourism, Little Rock, Ark.

Robert LeBlanc, assistant secretary, office of tourism, Department of Culture, Recreation and Tourism, Baton Rouge, La.

David Tester, Birmingham, Ala.

Sharon I. Pierce, Atlanta Convention and Visitors Bureau, Atlanta, Ga.

Joseph L. Gabbard, Ozarks Regional Commission, Little Rock, Ark.

Claude R. Glaze, Brotherhood of Railway Airline and Steamship Clerks, Stone Mountain, Ga.

Allen C. Ownby, Alabama Mountain Lakes Association, Huntsville, Ala.

Kathleen Mills, manager, tourism promotion, Greater Tampa Chamber of Commerce, Tampa, Fla.

J. S. Dennis, manager, Charlotte Chamber of Commerce, Convention and Visitors Bureau, Charlotte, Ala.

Donald B. Nicklas, program officer, Ozarks Regional Commission, Little Rock, Ark.

Robert Taylor, State of Alabama, Governor's Office, Montgomery, Ala.

Dick Kinney, executive director, Mid-Cumberland Tourist Organization, Nashville Chamber of Commerce, Nashville, Tenn.

Lou Oberste, tourism director, Arkansas Department of Parks and Tourism, Little Rock, Ark.

William L. Knight, director, Kentucky Department of Public Information, Advertising and Promotion, Frankfort, Ky.

Robert Whitney, director, division of tourism, Florida Department of Commerce, Tallahassee, Fla.

John Stroud, Governor's Office, Columbia, S.C.

Bill Barnes, Travel South, U.S.A., Atlanta, Ga.

Dan Mangeot, deputy, Kentucky Department of Public Information, Frankfort, Ky.

C. Dean Gaiser, assistant director, Florida Division of Tourism, Tallahassee, Fla.
George R. Leon, Puerto Rico Tourism, Atlanta, Ga.
David M. Reid, director, division of tourism, S.C. Department of Parks, Recreation, and Tourism, Columbia, S.C.
Arcilio Alvarado, director, Commonwealth of Puerto Rico, Tourism Development Co., U.S. Division, New York, N.Y.

Chicago Regional Meeting

LIST OF PARTICIPANTS

Bob Ellsworth, director, division of tourism, Department of Economic Development, St. Paul, Minn.
Jack Revoyr, department of business development, Madison, Wis.
Jack S. Wilson, director, travel bureau, Michigan Department of Commerce, Lansing, Mich.
Joseph Pisciotte, director, department of business and economic development, Springfield, Ill.
Sandy Guetller, managing director, office of tourism, Illinois Department of Business and Economic Development, Chicago, Ill.
Sheri B. Dunnington, director, tourism development division, Indianapolis, Ind.
David Crosson, chief, office of public information and education, Department of Natural Resources, Columbus, Ohio.
Frank Sain, convention and visitors bureau, Chicago, Ill.
Mary Stagaman, promotion manager, Cincinnati Convention Bureau, Cincinnati, Ohio.
Howard L. Potter, special assistant, Upper Great Lakes Regional Commission, Duluth, Minn.
Dick Raney, tourism division, Iowa Convention Commission, Des Moines, Iowa.
Robert D. Fritz, Illinois State Legislative Committee of the Brotherhood of Railroad and Airline Clerks, Palatine, Ill.
Loren Thorson, chief of recreation, Department of Natural Resources of Wisconsin, Madison, Wis.
E. C. Brennan, Cleveland Convention Bureau, Cleveland, Ohio.
Kyle McGonigle, Iowa Development Commission, Travel Development Divison Des Moines, Iowa.
Joanne F. McCrea, chairperson, Great Lakes Council of Regional Travel Executives, Office of Tourism, Columbus, Ohio.
Bruce E. McComb, director, program and administration division, travel bureau, Michigan Department of Commerce, Lansing, Mich.
Thomas Mannix, convention director, Columbus Convention and Visitors Bureau, Columbus, Ohio.
Arnold Sohn, planning superintendent, Iowa Conservation Commission, Des Moines, Iowa.
Leonard R. Barnes, Motor News, Automobile Club of Michigan, Dearborn, Mich.
Robert Juliano, Hotel and Motel Restaurant Employees and Bartenders Union International, AFL–CIO, Washington, D.C.
Frank Kirk, director, department of local government affairs, Springfield, Ill.
Philip DeVore, director, travel and tourism, Department of Economic and Community Development, Columbus, Ohio.
Marilane B. Spencer, secretary and general manager, Bixler Tours, Inc., Hiram, Ohio.
Col. John A. Riley, director of special events, City of Chicago, Chicago, Ill.
Tom Killeen, director of special projects, Metropolitan Detroit Convention and Visitors Bureau, Detroit, Mich.
Robert A. Thomas, manager, Minneapolis Convention and Tourism Bureau, Minneapolis, Minn.
Fred S. Daiger, exectuive director, Milwaukee Convention and Visitors Bureau, Milwaukee, Wis.
Frank Carrell, associate director, Cleveland Convention and Visitors Bureau, Cleveland, Ohio.

Denver Regional Meeting

List of participants

Josephine Brooker, Governor's Office, travel promotion unit, Department of Highways, Helena, Mont.

Mickey Gallivan, director, travel council, Salt Lake City, Utah.

Philip D. Brooks, regional economist, Old West Regional Commission, Rapid City, S. Dak.

Robert Knight, director tourism, El Paso Convention and Visitors Bureau, El Paso, Tex.

David Santillanes, Jr., executive director. Santa Fe Chamber of Commerce, Santa Fe, N. Mex.

W. R. "Dick" Stubbs, commissioner, Oklahoma Tourism and Recreation Commission, Henryetta, Okla.

Frank Hildebrand, executive director, Texas Tourist Development Agency, Austin, Tex.

Mona M. Smith, director, Arizona State Office of Tourism, Phoenix, Ariz.

Dale Young, Houston Convention and Visitors Council, Houston, Tex.

Buzz Sherry, executive vice president, Denver Convention and Visitors Bureau, Denver, Colo.

W. Bill Kundrat, tourist division, State of New Mexico, Santa Fe, N. Mex.

George Nigh, Lt. Governor, State of Oklahoma, Oklahoma Tourism and Recreation Commission, Oklahoma City, Okla.

Joseph Satrom, State travel director, State Highway Department, Bismark, N. Dak.

John Rosenow, director, tourism division, Department of Economic Development, Lincoln, Nebr.

Jim Battersby, president, Discover Texas Association, Chairman CARTO, San Antonio, Tex.

Shirley Condiff, director of tourism, Wichita Area Chamber of Commerce, Wichita, Kans.

Keith Dotson, State and regional coordinator, Four Corners Regional Commission, Farmington, N. Mex.

James L. Pasley, director, Missouri Division of Tourism, Jefferson City, Mo.

Carl Clark, director, tourism promotion, Oklahoma Tourism and Recreation Department, Oklahoma City, Okla.

Sam Graft, director, New Mexico Park and Recreation Commission, Santa Fe, N. Mex.

Jerry M. Barshop, director, Dallas Convention Center, Dallas, Tex.

Henry D. Nussbaum, director, San Antonio Convention and Visitors Bureau, San Antonio, Tex.

Warren Trafton, director, Greater St. Louis Convention and Visitors Bureau, St. Louis, Mo.

Dom Cimino, first vice president Espanola N.M. Chamber of Commerce, Espanola, N. Mex.

William Honerkemp, director, division of tourism development, Department of Economics, Pierre, S. Dak.

Earl Nielsen, State legislative chairman, BRAC, Denver, Colo.

G. Y. Falls, executive vice president, Albuquerque Chamber of Commerce, Albuquerque, N. Mex.

Hal Haney, director, travel marketing, State of Colorado, Denver, Colo.

Abe L. Hesser, executive director, Oklahoma Tourism and Recreation Department, Oklahoma City, Okla.

Mrs. Lee Witt, administrative assistant to the Governor, State of New Mexico, Santa Fe, N. Mex.

J. H. Andrus, director, Dallas Convention and Tourism Bureau, Dallas, Tex.

Sharon Easen, director of visitors relations, San Antonio Convention and Visitors Bureau, San Antonio, Tex.

L. L. "Les" Wood, Jr., chairman of the board, Convention and Visitors Bureau of Greater Kansas City, Kansas City, Mo.

John Marshall, head, convention and visitors bureau, Fort Worth Chamber of Commerce, Forth Worth, Tex.

Harry L. Wilson, director, Oklahoma City Convention and Tourism Center, Oklahoma City, Okla.

San Francisco Regional Meeting

LIST OF PARTICIPANTS

Allen A. Reeves, president, Greater Anchorage Convention/Visitors Bureau, Anchorage, Alaska.

Ron Smith, travel promotion director, Greater Reno Chamber of Commerce, Reno, Nev.

Dr. Thomas Hamilton, special adviser of the board of trustees, Estate of Bernice Pauahi Bishop, Honolulu, Hawaii.

Gerald L. Baker, director, San Diego Convention and Visitors Bureau, San Diego, Calif.

Robert E. Goodman, director, Nevada Department Economic Development, Carson City, Nev.

Bruce Rogers, Secretary of State's Office, State of California, Sacramento, Calif.

Frank S. Cheng, Guam Visitors Bureau, Aganan, Guam.

Mindy Lackey, Secretary of State's Office, State of California, Sacramento, Calif.

Charles S. Coleman, international vice president, Brotherhood of Railway & Airline Clerks, Cupertino, Calif.

Sara Behman, deputy director, Department of Industrial Relations for California, San Francisco, Calif.

Robert Negrete, employment development planner, employment development department, Sacramento, Calif.

Joseph Woodard, executive vice president, Los Angeles Convention and Visitors Bureau, Los Angeles, Calif.

Rossi Ralenkotter, Las Vegas Convention and Visitors Authority, Las Vegas, Nev.

W. Don Nelson, director tourism, State of Nebraska, Lincoln, Nebr.

Hideto Kono, director, State Department of Planning and Economic Development, Honolulu, Hawaii.

Robert Sullivan, general manager, San Francisco Convention and Visitors Bureau, San Francisco, Calif.

Daniel Dingfield, special projects coordinator, city of Seattle, office of policy planning, Seattle, Wash.

Darryl Monahan, director tourism, Nevada Department Economic Development, Carson City, Nev.

Claude Rand, T.W.A., Las Vegas, Nev.

Lloyd Howe, division of tourism and industrial development, State of Idaho, Boise, Idaho.

Dale Hess, assistant general manager, San Francisco Convention and Visitors Bureau, San Francisco, Calif.

William G. Shaw, travel director, travel development division, State of Washington, Olympia, Wash.

Len Hornsby, executive director, Las Vegas Convention and Visitors Authority, Las Vegas, Nev.

Victor Fryer, travel information officer, Salem, Oreg.

National Meeting—Surface Transportation Executives

LIST OF PARTICIPANTS

Thomas K. Reinhard, congressional affairs officer, National Railroad Passenger Corporation, Washington, D.C.

Charles A. Webb, president, National Association of Motor Bus Owners, Washington, D.C.

Roger A. Murch, director of government relations, National Car Rental System, Inc., Minneapolis, Minn.

C. D. Kirkpatrick, vice president of marketing, Greyhound Lines, Inc., Phoenix, Ariz.

Jerry J. Burgdoerfer, vice president of marketing, the Hertz Corp., New York, N.Y.

Scott D. Ballin (for William Kohler), the Delta Queen Steamboat Co., Washington, D.C.

Alfred A. Michaud, vice president of marketing, National Railroad Passenger Corporation, Washington, D.C.
John F. Wetzel, legislative analyst, Motorcycle Industry Council, Inc., Washington, D.C.
John E. Moore, association liaison director, Highway Users Federation, Washington, D.C.
Michael W. Price, assistant to the president, American Petroleum Institute, Washington, D.C.
Jack Boysen, managing director, national travel department, American Automobile Association, Falls Church, Va.
William C. McPike, president, Car and Truck Renting and Leasing Association (and senior vice president of Avis, Inc.), Garden City, N.Y.
Jim Thomas, director of government relations, Catrala, Washington, D.C.

NATIONAL MEETING—AIR TRANPORTATION EXECUTIVES LIST OF PARTICIPANTS

John A. Weinhart, staff vice president of sales, Dallas, Tex.
Walter G. Conrad, senior vice president of sales and services, Dallas, Tex.
Charles Strickler, vice president, American Airlines, Washington, D.C.
Beverlee Ahlin, assistant vice president, Allegheny Airlines, Inc., Washington, D.C.
Dan A. Cloussy, executive vice president, marketing and services, Pan American World Airways, Inc., New York, N.Y.
R. Daniel Devlin, director of legislative affairs, TransWorld Airlines, Inc., Washington, D.C.
Ronald McVickar, vice president, Northwest Orient Airlines, Washington, D.C.
Harvey Wexler, senior vice president, Continental Airlines, International and Governmental Affairs, Washington, D.C.
Thomas F. Powers, Jr., district marketing manager, National Airlines, Inc., Alexandria, Va.
Theodore P. Harris, special consultant, Pan American World Airways, Inc., Washington, D.C.
W. R. Balfour, vice president of sales and services, Western Airlines, Los Angeles, Calif.
John Krimsky, Jr., vice president of Federal affairs, Pan American World Airways, Inc., Washington, D.C.
Gabriel Phillips, vice president, traffic services, Air Transport Association of America, Washington, D.C.
Richard L. Neal, director of staff sales, Hughes Airwest, San Francisco, Calif.
John W. Dregge, vice president of Federal affairs, North Central Airlines, Inc., Washington, D.C.
Edward A. Dingivan, vice president, National Air Carrier Association, Washington, D.C.
Frederick Davis, vice president, Washington affairs, Ozark Airlines, Inc., Washington, D.C.
W. G. McGee, vice president of marketing, Piedmont Airlines, Winston-Salem, N.C.
Robert L. Kauffman, vice president of passenger marketing, National Airlines, Inc., Miami, Fla.
Archie Yawn, director of public affairs, Southern Airways, Inc., Atlanta, Ga.
David B. Kunstler, vice president of marketing, Eastern Airlines, Miami, Fla.
Charles P. Knecht, vice president of marketing, Delta Air lines, Inc., Atlanta, Ga.
Thomas S. Miles, president, Commuter Airline Association of America, Washington, D.C.
John R. Zeeman, vice president of system marketing, United Airlines, Chicago, Ill.
David L. Palmer, director of Agency Lines, Alaska Airlines, Seattle, Wash.
Carl F. Kettler, director of Federal affairs, Air Transport Association of America, Washington, D.C.
J. E. Reinke, vice president of government affairs, Eastern Airlines, Washington, D.C.

NATIONAL MEETING—PUBLIC INTEREST GROUP REPRESENTATIVES

LIST OF PARTICIPANTS

Voit Gilmore, Southern Pines, N.C., representing American Forestry Association, Washington, D.C.

Patricia Kennedy, Aviation Consumer Action Project, Washington, D.C.
Thomas G. Crikelair, assistant director, National Association of Railroad Passengers, Washington, D.C.
Rose Houk National Wildlife Federation, Washington, D.C.
J. N. "Mike" Horrocks, director, Public Citizen Visitors Center, Washington, D.C.
Al Massoni, acting executive director, American Institute of Planners, Washington, D.C.
Tom Mack, vice president and general manager, Landmark Services, Inc. Washington, D.C.
Frederick B. Goldberg, research director, National Consumer Information Center, Washington, D.C.
T. Destry Jarvis, administrative assistant, National Parks and Conservation Association, Washington, D.C.
Barry Tindall, director, public and environmental affairs, National Recreation and Park Association, Arlington, Va.

National Meeting—Lodging Executives

LIST OF PARTICIPANTS

James E. Gaffigan, American Hotel and Motel Association, Washington, D.C.
Robert C. Hazard, Jr., executive vice president, Best Western, Inc., Phoenix, Ariz.
William H. Edwards, executive vice president of operations, Hilton Hotels Corp., Beverly Hills, Calif.
Thomas R. Donnelly Jr., (with Holiday Inns), Washington, D.C.
Anthony Schoop, director of sales, Hyatt Hotels, Washington, D.C.
Richard W. Kernan, group vice president, restaurant group, Marriott Corp., Washington, D.C.
Albert L. McDermott, Washington representative, American Hotel and Motel Association, Washington, D.C.
Richard C. Kessler, vice chairman, Days Inns of America, Inc., Atlanta, Ga.
William B. Walton, vice chairman of the board, Holiday Inns, Inc., Memphis, Tenn.
Jack Craver, president, Host Enterprises, Inc., Lancaster, Pa.
Fred Alexander, regional vice president and general manager, Hyatt Regency, Washington, D.C.
Nicholas R. Bach, counsel, National Restaurant Association, Washington, D.C.
Joseph McCarthy, president, Quality Inns International, Inc., Silver Spring, Md.
Francis C. Loetterle, president, Ramada Inn System, Ramada Inns, Inc., Phoenix, Ariz.
Robert V. Walker, president, Rodeway Inns of America, Dallas, Tex.
Howard P. James, chairman/president, the Sheraton Corp., Boston, Mass.
William "Red" Reynolds, executive director, Roadside Business Association, Fairfax, Va.
Jorgen Viletoft, president, Radisson Hotel Corp., Minneapolis, Minn.
Richard E. Holtzman, president, Rockresorts, Inc., New York, N.Y.
Roy Watson, president, the Kahler Corp., Rochester, Minn.
Roger Manfred, president, TraveLodge International, Inc., El Cajon, Calif.
J. Linwood Rice, National Innkeeping Association, Richmond, Va.

National Meeting—Labor Representatives

LIST OF PARTICIPANTS

Edward J. Panarello, director of legislation and political action, Food and Beverage Trades Department, AFL–CIO, Washington, D.C.
Walter J. Bierwagen, member of the general executive board, Director of Public Affairs, Amalgamated Transit Union, Washington, D.C.
Fran Hay, secretary/treasurer, Association of Flight Attendants, Washington, D.C.
Robert E. Juliano, legislative representative, Hotel and Restaurant Employees and Bartenders International Union, AFL–CIO, Washington, D.C.
W. Roy Wilson, alternate national legislative director, United Transportation Union, Washington, D.C.

Peter E. McGuire, legislative assistant, Hotel and Restaurant Employees and Bartenders International Union, AFL–CIO, Washington, D.C.
Francis A. O'Connell, legislative director, Transportation Workers Union, Washington, D.C.
Jim Kennedy, national legislative counsel, Brotherhood of Railway and Airline Clerks, Washington, D.C.
O. William Moody, Jr., Washington representative, Seafarers International Union, Washington, D.C.
Jack Golodner (represented by Joan King, secretary), Counsel for Actors Equity, Washington, D.C.
Joseph W. Ballew, assistant to the general secretary-treasurer, Washington, D.C.
Robert F. Bonitati, Air Line Pilots Association, Washington, D.C.
Jerry Thompson, legislative representative, International Association of Machinists and Aerospace Workers, Washington, D.C.
Elton Barstad, airline coordinator, International Association of Machinists Washington, D.C.

National Meeting—Travel Promotion Executives

LIST OF PARTICIPANTS

James A. Henderson, executive vice president, American Express Co., New York, N.Y.
William D. Patterson, travel adviser, American Express Co., New York, N.Y.
Charles H. Carpenter, managing director, American Automobile Association, Falls Church, Va.
Robert H. Kruhm, director of communications and public relations, Association Management, American Society of Association Executives, Washington, D.C.
James A. Miller, president and chairman of the board, American Society of Travel Agents, Inc., Waldo Travel Agency, Inc., East Lansing, Mich.
J. R. "Jim" Phillips, vice president (American Express Representative), The Commercial National Bank, Little Rock, Ark.
Patrick J. Callan, vice president of marketing, Cypress Gardens, Fla.
William D. Toohey, president, Discover America Travel Organizations, Washington, D.C.
Peter V. Ueberroth, chairman, First Travel Corp., Ask Mr. Foster Travel Service, Encino, Calif.
O. John Weber, chairman, Florida-Caribbean Cruise Association, Miami, Fla.
Charles Fritts, International Brotherhood of Teamsters, Washington, D.C.
John H. Reurs, chairman, New York Committee, International Committee of Passenger Lines, New York, N.Y.
William J. Armstrong, manager, International Passenger Ship Association and Cruise Lines International Association, New York, N.Y.
L. W. Lane, Jr., chairman of the board and publisher, Sunset Magazine, Lane Publishing Co., Menlo Park, Calif.
Herb Schulte, vice president of corporate planning, Meredith Corp., Des Moines, Iowa.
Gerald W. Tays, special assistant to the director, National Park Service, Washington, D.C.
William "Red" Reynolds, executive director, Roadside Business Association, Fairfax, Va.
Ken Fischer, administrative coordinator, Society of American Travel Writers, Washington, D.C.
Jeanne Westphal, member of the board of directors, Society of American Travel Writers, Washington, D.C.
David L. Loretto, president and chief executive officer, Thomas Cook, Inc., New York, N.Y.
Douglas C. Frechtling, Ph. D., director, U.S. Travel Data Center, Washington D.C.

National Meeting—Attractions and Recreational Activities Representatives

LIST OF PARTICIPANTS

W. Munro Roberts III, director of marketing, Busch Gardens Division, Anheuser-Busch, Inc., St. Louis, Mo.

George F. Wright, director of travel, Colonial Williamsburg Foundation, Williamsburg, Va.

Edward R. Book, president, Herco, Inc., Hershey, Pa.

Derrick Crandall, director of government affairs, International Snowmobile Industry Association, Washington, D.C.

Michael A. Fryer, president, National Industrial Recreation Association, Chicago, Ill.

Cal Conniff, executive director, National Ski Areas Association, West Hartford, Conn.

William A. V. Cecil, the Biltmore Co., Asheville, N.C.

Patrick J. Callan, president, Florida Attraction Association, Cypress Gardens, Fla.

William T. Jobe, Jr., executive vice president, International Snowmobile Industry Association, Washington, D.C.

Tom Mack, vice president, MCA, Inc. (Recreation), Washington, D.C.

W. S. "Bill" Williams, president, National Campground Owners Association, Greensboro, N.C.

Laurance S. Morrison, director, public information and visitor promotion, Sturbridge, Mass.

George H. Delanoy, vice president of marketing, Six Flags, Inc., Los Angeles, Calif.

Jerome C. Loftus, assistant general counsel, Recreation Vehicle Industry Association, Inc., Washington, D.C.

Gerald W. Tays, special assistant to the director, National Parks Service, Washington, D.C.

John D. Chapman, vice president of marketing, Taft Broadcasting Co., Cincinnati, Ohio.

William H. Kohler, attorney, The Delta Queen Steamboat Co., Washington, D.C.

Albert L. McDermott, McDermott and Russell, Washington, D.C.

APPENDIX C

Results of the National Tourism Policy Study Followup Questionnaire

PART I

Issues and Needs of the Tourism and Travel Industry

	Percentage base	Importance rating						Who should be responsible					
		Very important	Important	Somewhat important	Not very important	Not at all important	No opinion	Federal Government	Regional commission	State government	City/local government	Private sector	No opinion
RESEARCH													
QUESTION 1.—Need to perform national travel survey on annual basis versus 5-year basis													
Total	117	35	29	20	14	2	0	93	11	13	3	12	0
National meeting	57	35	25	19	19	2	0	96	7	9	2	12	0
Regional meeting	60	35	33	22	8	2	0	90	15	17	3	12	0
QUESTION 2.—Need more extensive quantitative data collection and economic impact studies at the regional, State, and local levels of the tourism industry (including rural and small city areas)													
Total	117	49	32	14	3	2	0	43	41	68	38	24	2
National meeting	57	37	35	19	7	2	0	39	39	53	23	18	4
Regional meeting	60	60	30	8	0	2	0	47	43	83	53	30	0
QUESTION 3.—Need for greater research on the relative costs and benefits of tourism development projects as a means of raising the priority of tourism development in the public eye													
Total	117	52	30	10	6	1	1	60	18	40	11	26	3
National meeting	57	46	33	9	10	0	2	61	19	26	4	28	5
Regional meeting	60	58	26	12	2	2	0	58	17	53	18	25	2
QUESTION 4.—Need research data useful for State/local decisionmaking on planning and development activities (rather than data useful solely for promotional activities, etc.)													
Total	117	26	40	27	4	1	2	27	26	70	35	22	3
National meeting	57	14	35	44	5	2	0	19	25	65	30	12	5
Regional meeting	60	33	45	12	2	0	3	35	28	75	40	32	2

QUESTION 5.—Need for more sophisticated research on travel flows from State to State by type of carrier, origin and destination information, economic impact factors such as expenditures, employment levels, local and State tax revenues generated by tourism activities, etc.

Total	117	37	38	19	3	2	1	68	31	38	10	20	2
National meeting	57	28	42	19	7	2	2	70	26	33	4	23	4
Regional meeting	60	45	35	18	0	2	0	65	35	43	17	17	0

QUESTION 6.—Need to develop a series of national economic indicators for the tourism industry (similar to GNP and the Government's "Leading Economic Indicators") to measure short-term trends in the tourism industry and aid in future prediction

Total	117	31	41	20	4	2	2	91	6	15	2	11	2
National meeting	57	31	38	18	7	4	2	86	5	11	0	14	2
Regional meeting	60	30	43	23	2	0	2	97	7	20	3	8	2

QUESTION 7.—Need for greater research into the national tourism programs of foreign countries

Total	117	20	22	31	23	4	0	89	5	4	1	9	6
National meeting	57	24	25	26	21	4	0	88	4	4	2	14	4
Regional meeting	60	15	20	35	25	5	0	90	7	5	0	3	8

QUESTION 8.—Need for greater research into seasonality trends in the industry and possible techniques for alleviating seasonality problems

Total	117	20	31	38	10	1	0	50	23	50	9	35	2
National meeting	57	19	26	39	14	2	0	40	14	37	5	42	4
Regional meeting	60	21	35	37	7	0	0	58	32	63	13	28	0

QUESTION 9.—Need research on tourism in rural areas and on the use of rural outdoor recreational facilities

Total	117	10	18	39	28	5	0	29	29	59	18	16	3
National meeting	57	9	10	33	39	9	0	23	21	49	14	23	5
Regional meeting	60	12	25	43	18	2	0	35	37	68	22	10	2

QUESTION 10.—Need research which is oriented specifically toward developing solutions for the tourism/travel industry's key problems

Total	117	37	35	19	5	2	2	62	19	38	14	50	5
National meeting	57	33	38	18	5	2	4	61	16	25	7	53	7
Regional meeting	60	40	31	22	5	2	0	63	22	50	20	48	3

QUESTION 11.—Need better and more accurate research on the future capital requirements of the tourism/ travel industry and the relationship between capital investment and generation of jobs

	Percentage base	Importance rating						Who should be responsible					
		Very important	Important	Somewhat important	Not very important	Not at all important	No opinion	Federal Government	Regional commission	State government	City/local government	Private sector	No opinion
Total	117	35	38	17	4	4	2	60	15	33	13	48	6
National meeting	57	38	37	16	0	7	2	58	9	23	7	49	7
Regional meeting	60	31	40	18	7	2	2	62	20	43	18	47	5

QUESTION 12.—Need research on the economic contribution of cultural attractions (theaters, dance, orchestras, etc.) to growth of the tourism/travel industry

Total	117	10	26	31	25	6	2	32	15	38	33	38	7
National meeting	57	9	16	37	26	10	2	26	14	35	25	40	9
Regional meeting	60	12	35	25	23	2	3	37	17	40	42	35	5

QUESTION 13.—Need research for more effective means to conserve energy in the tourism industry (past conservation measures have only shifted travel patterns rather than actually conserving energy)

Total	117	57	26	10	4	1	2	91	15	30	12	31	1
National meeting	57	61	19	10	4	2	4	88	9	23	9	35	2
Regional meeting	60	53	33	10	4	0	0	93	22	37	15	27	0

QUESTION 14.—Need for coordinated distribution of information on State and local tax revenues generated by tourism and employment within the industry

Total	117	34	32	24	5	4	1	32	21	74	38	16	5
National meeting	57	25	35	28	5	5	2	33	25	61	25	16	9
Regional meeting	60	43	30	20	5	2	0	30	17	85	50	17	2

QUESTION 15.—Need to establish guidelines for common definitions of tourism terms, standardized methodologies for data collection, and research data categories responsive to tourism research needs

Total	117	44	32	17	4	2	1	74	15	27	9	39	6
National meeting	57	33	38	25	2	0	2	70	12	16	5	47	4
Regional meeting	60	53	27	10	7	3	0	78	17	38	12	32	8

QUESTION 16.—Need to insure uniform statistical data collection procedures at the regional, State, and local levels, which would permit nationwide dissemination and sharing of such data

Total	117	46	27	21	3	2	1	79	26	47	28	27	3
National meeting	57	35	33	26	4	0	2	72	26	39	25	30	4
Regional meeting	60	56	22	17	2	3	0	85	27	55	32	25	3

QUESTION 17.—Need for a clearinghouse to administer and coordinate collection and distribution of regional, State, and local research data, as well as research data gathered by various Federal agencies (e.g., Bureau of Immigration's Data on Foreign Visitors to the United States)

Total	117	34	38	21	4	2	1	87	15	13	7	12	3
National meeting	57	30	35	24	7	2	2	84	12	7	7	12	5
Regional meeting	60	38	41	17	2	2	0	90	17	18	7	12	0

QUESTION 18.—Need for a clearinghouse to coordinate and promote the public dissemination of Federal and State cost/benefit and project feasibility studies in the travel industry to serve as a guide in State and local regional economic development planning

Total	117	17	32	36	13	1	1	70	24	32	6	15	4
National meeting	57	10	31	46	11	0	2	61	25	32	4	19	5
Regional meeting	60	23	33	27	15	2	0	78	23	32	8	10	3

QUESTION 19.—Need a uniform method for substantiating the effect of travel promotion expenditures on market growth

Total	117	23	43	23	9	1	1	58	12	33	10	48	4
National meeting	57	17	37	33	9	2	2	60	7	9	2	54	4
Regional meeting	60	28	50	13	9	0	0	57	17	57	18	42	5

QUESTION 20.—Need for coordination of non-tourism-oriented research data collection procedures and methodologies used in various Federal agencies to enhance the usefulness of such research data for the tourism industry

Total	117	10	23	37	21	8	1	79	5	9	1	7	9
National meeting	57	12	19	30	26	11	2	72	7	7	0	12	11
Regional meeting	60	8	27	43	17	5	0	87	3	10	2	2	8

QUESTION 21.—Need greater coordination with private sector efforts to develop useful tourism research data

Total	117	38	36	21	3	1	1	71	19	39	18	61	3
National meeting	57	33	30	30	3	2	2	81	18	25	14	60	4
Regional meeting	60	43	42	13	2	0	0	62	20	53	22	62	2
City	17	59	35	0	6	0	0	76	12	29	6	71	6
State	25	36	48	16	0	0	0	52	24	60	16	48	0
Other	18	39	39	22	0	0	0	61	22	67	44	72	0

QUESTION 22.—Need revision and simplification of Federal and State franchise laws to stimulate private sector facility development in the tourism/travel industry

	Percentage base	Importance rating						Who should be responsible					
		Very important	Important	Somewhat important	Not very important	Not at all important	No opinion	Federal Government	Regional commission	State government	City/local government	Private sector	No opinion
Total	117	12	33	21	24	6	4	74	7	53	3	21	11
National meeting	57	12	34	21	19	7	7	68	9	46	2	18	12
Regional meeting	60	12	33	20	28	5	2	80	5	60	5	23	10
City	17	17	47	18	18	0	0	94	6	65	6	29	6
State	25	12	28	16	32	12	0	80	4	56	4	16	4
Other	18	5	28	28	33	0	6	67	6	61	6	28	22

QUESTION 23.—Need better research on the relative costs of job-creation in the tourism industry versus other industries (e.g., costs of job training, required capital investment, etc.)

Total	117	25	33	29	8	3	2	68	18	38	10	38	6
National meeting	57	30	24	28	12	4	2	68	7	26	5	42	5
Regional meeting	60	20	41	30	5	2	2	68	28	48	15	33	7

PLANNING

QUESTION 1.—Need for greater planning by Federal public land agencies to achieve a better balance between public demands for different types of recreational facilities

Total	117	24	32	33	4	3	4	85	10	26	6	10	7
National meeting	57	23	16	47	5	4	5	82	9	21	7	14	9
Regional meeting	60	25	48	20	2	2	3	88	12	30	5	7	5

QUESTION 2.—Need more planning or support for State/local planning of distribution of recreational water resources in water-scarce regions of the United States

Total	117	15	25	40	15	1	4	45	40	59	17	6	7
National meeting	57	12	25	37	21	0	5	42	39	53	16	9	7
Regional meeting	60	18	25	43	10	2	2	48	42	65	18	3	7

QUESTION 3.—Need for planning which takes fuller account of the short-term and long-term environmental impacts of tourism development

Total	117	26	32	32	7	1	2	67	33	55	19	23	4
National meeting	57	23	28	37	10	0	2	75	33	42	12	25	4
Regional meeting	60	28	37	28	3	2	2	58	33	67	25	22	5

QUESTION 4.—Need tourism development planning to alleviate the long-term negative impacts of rising energy costs on the growth of the domestic tourism and travel industry													
Total	117	46	33	13	4	0	4	80	18	36	17	36	5
National meeting	57	46	35	14	2	0	3	79	19	28	14	39	7
Regional meeting	60	46	30	12	7	0	5	83	17	43	20	33	3
QUESTION 5.—Need comprehensive tourism planning of available resources/activities/future needs in areas in addition to outdoor recreation (e.g., attractions, services, etc.)													
Total	117	14	36	32	11	3	4	44	27	52	24	32	7
National meeting	57	7	33	38	14	4	4	39	26	35	12	37	9
Regional meeting	60	22	38	25	8	2	5	50	28	68	35	27	5
QUESTION 6.—Need for Bureau of Outdoor Recreation to require consideration of tourism as part of State comprehensive outdoor recreation plans (SCORP) program													
Total	117	20	28	26	11	10	5	68	5	41	3	6	15
National meeting	57	9	21	33	18	12	7	56	5	42	4	11	21
Regional meeting	60	30	35	20	5	7	3	80	5	40	3	2	8
QUESTION 7.—Need development of long-range contingency plans for the tourism industry in the face of potential energy shortages, economic recession, etc.													
Total	117	54	29	8	4	2	3	73	15	41	15	47	5
National meeting	57	58	24	9	5	2	2	74	7	25	5	49	4
Regional meeting	60	50	33	8	3	2	4	72	23	57	25	45	7
QUESTION 8.—Need for a national transportation plan													
Total	117	46	28	12	9	3	2	88	12	21	10	26	9
National meeting	57	40	28	16	14	0	2	89	14	16	11	32	5
Regional meeting	60	52	28	8	3	7	2	87	10	27	10	20	12
QUESTION 9.—Need for national energy planning to promote efficient development of domestic energy resources													
Total	117	79	13	4	1	1	2	94	10	28	8	26	4
National meeting	57	81	12	2	2	0	3	96	11	25	9	30	4
Regional meeting	60	76	13	7	0	2	2	92	10	32	7	22	5

QUESTION 10.—Need to coordinate findings of federally funded cost/benefit and project feasibility studies and to publicize the availability of study findings as a form of technical assistance to State/loca governments and the private sector

	Percentage base	Importance rating						Who should be responsible					
		Very important	Important	Somewhat important	Not very important	Not at all important	No opinion	Federal Government	Regional commission	State government	City/local government	Private sector	No opinion
Total	117	15	32	34	14	2	3	83	17	24	11	15	7
National meeting	57	9	28	38	17	4	4	86	11	28	7	19	7
Regional meeting	60	21	35	30	10	2	2	80	23	20	15	10	7

QUESTION 11.—Need for a national tourism planning process to coordinate tourism or tourism-related planning among Federal agencies, and initiate State comprehensive tourism planning

Total	117	36	37	13	8	3	3	83	12	46	8	14	9
National meeting	57	35	33	9	14	5	4	77	11	39	4	18	12
Regional meeting	60	37	40	17	3	0	3	88	13	53	12	10	7

QUESTION 12.—Need for Federal tourism planning activities to include more inputs from State and local governments concerning their needs

Total	117	34	41	20	2	0	3	79	15	57	32	14	6
National meeting	57	26	38	28	4	0	4	79	14	58	25	16	5
Regional meeting	60	42	43	12	0	0	3	80	15	57	38	12	7

DEVELOPMENT

QUESTION 1.—Need to expand Amtrak services to less-visited rural areas with tourism and recreation potential

Total	117	13	13	25	24	21	4	67	8	15	3	14	21
National meeting	57	7	5	26	26	32	4	68	4	5	2	11	18
Regional meeting	60	18	20	23	22	12	5	65	12	23	5	17	23

QUESTION 2.—Need to expand the number of federally designated port-of-entry cities

Total	117	13	25	26	20	13	3	83	6	9	11	8	13
National meeting	57	12	32	21	18	12	5	86	4	7	9	12	12
Regional meeting	60	13	18	30	23	14	2	80	8	12	13	3	13

89-959—77——12

QUESTION 3.—Need financial and technical support for improvement in foreign visitor port-of-entry facilities, including interpreters and currency exchange facilities, customs and immigration clearance facilities, and foreign language informational materials and services

Total	117	38	34	16	8	1	3	92	5	16	17	15	4
National meeting	57	44	33	12	5	2	4	89	5	5	12	18	7
Regional meeting	60	31	35	20	12	0	2	95	5	27	22	12	2

QUESTION 4.—Need for more financial support for public works programs which directly support facilities and lodging accommodations either within or adjacent to national parks

Total	117	8	20	38	25	8	1	73	13	23	3	13	12
National meeting	57	7	21	40	23	7	2	61	11	21	0	14	12
Regional meeting	60	8	20	37	27	8	0	83	15	25	7	12	12

QUESTION 5.—Need to provide more favorable Federal investment tax incentives for private sector development of tourism facilities such as lodging and recreational attractions

Total	117	27	33	22	10	6	2	87	4	17	3	23	6
National meeting	57	33	30	19	10	4	4	84	4	7	0	25	9
Regional meeting	60	22	37	23	10	8	0	90	5	27	5	22	3

QUESTION 6.—Need for greater funding and staffing for the national parks

Total	117	20	24	43	8	1	4	88	3	8	1	3	8
National meeting	57	16	19	51	9	0	5	86	4	7	0	5	9
Regional meeting	60	25	28	35	7	2	3	90	2	8	2	2	7

QUESTION 7.—Need greater funding for the Bureau of Outdoor Recreation's land and water conservation fund

Total	117	14	16	46	13	4	7	85	2	9	1	0	13
National meeting	57	9	10	51	16	5	9	84	0	7	0	0	14
Regional meeting	60	18	22	42	10	3	5	85	3	12	2	0	12

QUESTION 8.—Need greater support for development projects aimed at providing recreational opportunities and facilities for the economically disadvantaged

Total	117	9	34	35	10	8	4	68	15	45	20	9	11
National meeting	57	0	37	30	16	10	7	58	14	35	21	12	14
Regional meeting	60	16	32	40	5	5	2	78	15	55	18	5	8

QUESTION 9.—Need to retain cabotage laws (coastal navigation and commerce) to insure continued protection of domestic waterways carriers

	Percentage base	Importance rating						Who should be responsible					
		Very important	Important	Somewhat important	Not very important	Not at all important	No opinion	Federal Government	Regional commission	State government	City/local government	Private sector	No opinion
Total	117	4	29	29	13	16	9	76	7	15	0	3	18
National meeting	57	5	25	28	12	21	9	75	5	12	0	2	21
Regional meeting	60	3	33	30	13	12	9	77	8	17	0	3	15

QUESTION 10.—Need more financial support for renovation and preservation of national historical sites (national sites and national landmarks) by both the public and private sectors (including revision of appropriate laws/regulations and upgrading of National Landmarks Committee)

Total	117	16	43	30	7	0	4	87	14	41	26	28	6
National meeting	57	10	40	30	11	0	9	77	14	32	23	28	12
Regional meeting	60	22	45	30	3	0	0	97	13	50	30	28	0

QUESTION 11.—Need to simplify application and approval procedures for matching development funds in a number of Federal agencies (e.g., Bureau of Outdoor Recreation's land and water conservation fund)

Total	117	22	30	28	10	3	7	82	4	13	5	3	13
National meeting	57	12	23	37	14	5	9	74	2	11	2	2	21
Regional meeting	60	31	37	20	7	0	5	90	7	14	8	3	5

QUESTION 12.—Need to clarify approval criteria for matching fund development grants in a number of Federal agencies

Total	117	26	30	31	7	1	5	88	4	10	4	3	9
National meeting	57	14	24	39	12	2	9	79	5	5	0	2	18
Regional meeting	60	38	35	23	2	0	2	97	3	15	8	5	2

QUESTION 13.—Need streamling of EPA's environmental impact statement review process to reduce delays in tourism facility development

Total	117	45	33	12	6	1	3	94	2	10	5	9	4
National meeting	57	48	35	5	7	0	5	91	2	9	0	11	7
Regional meeting	60	43	32	18	5	2	0	97	2	12	10	8	2

QUESTION 14.—Need for greater continuity in Federal programs supporting or impacting on tourism development activities

Total	117	33	49	13	2	1	2	95	3	8	3	7	3
National meeting	57	24	56	14	2	0	4	91	4	4	0	11	5
Regional meeting	60	41	42	12	3	2	0	98	2	12	5	3	2

QUESTION 15.—Need to rationalize and simplify Federal regulation of tourism facilities development to alleviate difficulties developers experience in obtaining commercial bank loans due to extensive, restrictive, and inconsistent Federal regulations

Total	117	34	39	17	5	1	4	91	6	9	4	22	4
National meeting	57	33	35	21	7	0	4	88	7	9	2	23	5
Regional meeting	60	35	43	13	3	2	4	95	5	10	7	22	3

QUESTION 16.—Need to increase the professional management skills of staff in some public land agencies responsible for direct management of publicly owned travel properties

Total	117	17	28	37	10	1	7	71	9	28	4	4	9
National meeting	97	12	28	35	11	2	12	63	11	26	4	7	14
Regional meeting	60	22	28	38	10	0	2	78	8	30	5	2	5

QUESTION 17.—Need more extensive development of intra- and inter-city public transportation facilities which will directly support tourism activities (e.g., weekend use of municipal buses for urban tourism, expansion of subsidy and matching fund development programs, etc.)

Total	117	18	32	41	11	4	4	56	10	42	50	24	8
National meeting	57	14	28	30	16	3	9	47	5	35	47	30	12
Regional meeting	60	21	37	32	7	3	0	63	15	48	52	18	3

QUESTION 18.—Need Federal Government support for greater private commercial resort development on Federal recreation lands (including National Park Service, U.S. Forest Service, Bureau of Land Management)

Total	117	15	19	32	15	12	7	76	3	5	3	26	18
National meeting	57	12	12	38	16	11	11	72	7	2	0	23	25
Regional meeting	60	71	25	27	15	13	3	80	0	8	5	28	12

QUESTION 19.—Need greater support (e.g., revision of minimum lending requirements) from the Economic Development Administration for development of small businesses in the tourism industry

Total	117	16	35	29	11	3	6	78	6	9	2	23	12
National meeting	57	7	30	37	14	3	9	72	9	7	0	21	14
Regional meeting	60	25	40	22	8	2	3	83	3	10	3	25	10

QUESTION 20.—Need to provide 1-to-1 technical assistance and support for small businesses in the tourism industry (management, planning, financing, etc.)

	Percentage base	Importance rating						Who should be responsible					
		Very important	Important	Somewhat important	Not very important	Not at all important	No opinion	Federal Government	Regional commission	State government	City/local government	Private sector	No opinion
Total	117	13	18	37	19	8	5	57	13	31	8	30	12
National meeting	57	7	14	31	32	9	7	53	16	19	7	28	14
Regional meeting	60	18	22	42	7	8	3	62	10	42	8	32	10

QUESTION 21.—Need more financial and technical support for local and private development of historic and cultural facilities within the United States

Total	117	15	28	32	15	3	7	58	12	42	29	38	19
National meeting	57	9	17	42	21	2	9	53	12	37	21	35	14
Regional meeting	60	22	38	22	8	5	5	63	12	47	37	42	7

QUESTION 22.—Need regulatory support for increased airline service to smaller cities

Total	117	17	21	32	18	3	9	78	4	11	8	19	15
National meeting	57	14	24	25	23	2	12	75	4	7	5	25	18
Regional meeting	60	20	18	38	14	5	5	80	5	15	10	13	12

QUESTION 23.—Need for Corps of Engineers to take better account of recreational potential of water resource development projects and of the recreational requirements of local areas

Total	117	18	33	28	13	3	5	80	9	16	7	2	13
National meeting	57	12	21	35	18	5	9	74	7	14	7	2	21
Regional meeting	60	23	45	22	8	0	2	87	10	18	7	2	5

QUESTION 24.—Need to revise criteria for approving matching fund development grants in a number of agencies to insure equitable treotment for smaller, less populated States

Total	117	18	20	31	17	5	9	75	6	26	4	2	18
National meeting	57	7	12	33	27	7	14	63	2	32	5	2	28
Regional meeting	60	28	28	28	8	4	4	87	10	20	3	2	8

QUESTION 25.—Need for the Bureau of Outdoor Recreation to provide greater support for development of recreational facilities specifically designed to stimulate tourism under the land and water conservation fund program

Total	117	11	25	38	14	3	9	80	7	14	2	3	15
National meeting	57	3	16	39	26	4	12	72	7	11	0	5	21
Regional meeting	60	18	33	37	3	2	7	88	7	17	3	2	8

QUESTION 26.—Need for Bureau of Outdoor Recreation funding policies to include greater emphasis on development of urban outdoor recreational facilities

Total	117	10	28	33	15	3	11	74	5	15	15	2	17
National meeting	57	5	26	28	23	4	14	63	9	9	14	4	25
Regional meeting	60	13	30	38	8	2	9	85	2	22	17	0	10

QUESTION 27.—Need to encourage regional commissions to allocate greater funds for tourism development projects

Total	117	23	30	30	7	4	6	38	68	22	6	9	11
National meeting	57	10	38	28	11	4	9	30	72	9	4	5	16
Regional meeting	60	35	22	32	3	5	3	45	65	35	8	12	7

QUESTION 28.—Need greater Government financial and technical support for private sector development efforts

Total	117	13	24	26	14	14	9	59	9	26	11	40	16
National meeting	57	9	21	26	19	11	14	54	5	16	7	35	21
Regional meeting	60	16	27	27	10	17	3	63	12	37	15	45	12

QUESTION 29.—Need criteria for allocating development funds to be based on view of tourism as an interrelated process with widespread economic impacts versus view of tourism as destination-oriented with only limited economic impacts

Total	117	27	42	16	10	1	4	71	22	32	16	21	15
National meeting	57	24	37	16	14	0	9	68	18	18	9	28	21
Regional meeting	60	28	46	17	7	2	0	73	27	45	23	15	10

QUESTION 30.—Need for public land agencies to provide better planned access to public lands for recreational enjoyment by the public

Total	117	19	27	38	8	2	6	75	19	38	10	1	9
National meeting	57	14	21	39	14	0	12	68	21	18	5	0	16
Regional meeting	60	23	33	38	2	4	0	82	17	57	15	2	2

QUESTION 31.—Need for development policies of public land agencies to be flexible in responding to regional needs rather than rigidly uniform across the country

Total	117	24	30	28	12	1	5	74	33	29	3	3	10
National meeting	57	19	26	30	16	0	9	65	28	26	0	4	18
Regional meeting	60	28	33	27	8	2	2	83	38	32	7	2	3

QUESTION 32.—Need for Federal development funds available for State parks to be allocated equitably from State to State (partially on the basis of the number of out-of-State users of such parks)

	Percentage base	Importance rating						Who should be responsible					
		Very important	Important	Somewhat important	Not very important	Not at all important	No opinion	Federal Government	Regional commission	State government	City/local government	Private sector	No opinion
Total	117	10	22	34	20	4	10	74	6	32	2	0	17
National meeting	57	5	19	34	23	7	12	63	4	32	0	0	25
Regional meeting	60	13	25	35	17	2	8	83	8	33	3	0	10

QUESTION 33.—Need Department of Housing and Urban Development block grants for urban renewal to be allocated with greater policy emphasis on projects designed to stimulate tourism and tourism-related job opportunities

Total	117	15	21	27	21	5	11	72	2	15	22	9	19
National meeting	57	14	14	28	24	2	18	61	4	18	21	9	25
Regional meeting	60	15	28	27	17	8	5	82	0	12	23	8	13

QUESTION 34.—Federal energy policies need to provide for regional differences

Total	117	48	29	13	5	2	3	89	19	17	3	6	5
National meeting	57	37	30	19	5	4	5	81	19	9	0	7	9
Regional meeting	60	58	28	7	5	2	0	97	18	25	7	5	2

QUESTION 35.—Federal energy policies should support development of alternative forms of transportation to the automobile (e.g., railroads and mass transit)

Total	117	43	32	13	4	3	5	84	8	18	12	19	9
National meeting	57	33	44	7	5	2	9	77	7	14	7	23	12
Regional meeting	6	53	20	18	3	4	2	90	8	22	17	15	5

QUESTION 36.—Need greater development of offseason (winter) tourism facilities/services/attractions

Total	117	22	35	23	6	7	7	39	18	46	20	54	12
National meeting	57	14	32	28	9	5	12	39	16	35	12	51	19
Regional meeting	60	30	38	18	3	9	2	40	20	57	27	57	5

QUESTION 37.—Need financial incentives to support development of U.S. registered cruise ships

Total	117	14	18	20	20	20	8	66	0	3	0	18	24
National meeting	57	14	19	17	18	18	14	65	0	4	0	21	26
Regional meeting	60	13	17	22	23	22	3	67	0	2	0	15	22

QUESTION 38.—Need for a national transportation policy to encourage development of a nationwide intermodal transportation system

Total	117	27	28	23	10	5	7	85	9	15	6	19	12
National meeting	57	23	24	23	16	3	11	79	7	11	4	25	14
Regional meeting	60	32	30	23	5	7	3	90	12	20	8	13	10

QUESTION 39.—Need for joint Department of Labor/industry management/labor union development of job-training programs for the tourism industry among low-skilled workers, minorities, etc. (e.g., job training as tourism hosts and guides, etc.)

Total	117	13	22	35	18	8	4	76	9	33	12	38	10
National meeting	57	14	17	30	25	5	9	70	9	21	9	33	16
Regional meeting	60	11	27	40	12	10	0	82	10	45	15	43	5

QUESTION 40.—Need for Urban Mass Transportation Administration to permit use of Federal funds for training busdrivers as tourism guides

Total	117	2	9	22	36	23	8	55	4	10	15	20	22
National meeting	57	2	7	19	37	24	11	53	2	5	12	25	26
Regional meeting	60	3	10	25	35	22	5	57	7	15	18	15	18

QUESTION 41.—Need for technical advice to facilities developers on the facility needs of large tourism groups, international visitors, etc.

Total	117	11	25	28	19	8	9	45	10	29	10	34	17
National meeting	57	10	18	33	18	5	16	42	4	23	9	33	26
Regional meeting	60	12	32	23	20	10	3	48	17	35	12	35	8

QUESTION 42.—Need for Federal public land agencies to adopt maximization of economic benefits for the tourism industry as a leading criterion in development and management of Federal resource lands

Total	117	8	32	33	11	8	8	83	7	9	3	8	15
National meeting	57	9	26	32	12	7	14	79	7	11	2	12	19
Regional meeting	60	7	37	35	10	8	3	87	7	8	3	3	10

QUESTION 43.—Need to reconcile sometimes conflicting objectives of the Wilderness Act of 1964 (establishing areas to be preserved in their wilderness condition) and programs of the National Park Service and U.S. Forest Service

	Percentage base	Importance rating						Who should be responsible					
		Very important	Important	Somewhat important	Not very important	Not at all important	No opinion	Federal Government	Regional commission	State government	City/local government	Private sector	No opinion
Total	117	17	29	27	13	4	10	79	5	8	2	1	15
National meeting	57	10	32	19	18	5	16	65	7	7	0	0	26
Regional meeting	60	23	27	35	8	3	4	92	3	8	3	2	5

QUESTION 44.—Need to minimize program duplication between regional commissions and ofher Federal agencies

Total	117	28	38	20	6	2	6	85	68	11	3	3	8
National meeting	57	30	33	21	5	0	11	79	58	5	2	2	14
Regional meeting	60	27	43	18	7	3	2	90	77	17	5	5	2

QUESTION 45.—Need for the Federal Government to directly regulate or coordinate State regulation of the motorcoach industry to achieve national uniformity of standards and service

Total	117	14	19	21	18	21	7	68	3	31	3	15	21
National meeting	57	12	19	21	18	18	12	67	5	30	0	18	25
Regional meeting	60	17	18	22	18	23	2	70	2	32	5	12	17

QUESTION 46.—Need for better coordination among Federal public land agencies, State and local governments and, where relevant, the Department of Transportation, to insure adequate public access to Federal parklands

Total	117	14	28	31	16	2	9	78	14	45	26	6	13
National meeting	57	10	30	21	25	0	14	74	11	33	16	7	19
Regional meeting	60	17	27	40	8	5	3	82	17	57	35	5	7

QUESTION 47.—Need to reconcile conflicting rules and regulations among Federal regulatory agencies which often make proper compliance impossible and have a dampening effect on development of new facilities and services in the tourism/travel industry (e.g., Department of Labor and Internal Revenue Service, Federal Energy Administration, and Occupational Safety and Health)

Total	117	42	39	13	1	1	4	93	3	13	2	13	5
National meeting	57	42	33	18	0	0	7	91	5	7	2	12	7
Regional meeting	60	41	45	8	2	2	2	95	2	18	2	13	3

QUESTION 48.—Need for greater coordination between the Department of Labor and the Department of Commerce in formulating and implementing tourism development policies and programs

Total	117	35	33	19	4	2	7	89	2	3	0	5	9
National meeting	57	44	28	14	5	0	9	86	2	2	0	9	12
Regional meeting	60	27	38	23	3	4	5	92	2	5	0	2	5

QUESTION 49.—Need for public land agencies to be more sensitive to special regional needs and requirements in undertaking development of Federal lands for recreation

Total	117	16	39	25	9	4	7	77	25	18	4	5	13
National meeting	57	16	35	23	14	3	9	70	26	19	5	7	18
Regional meeting	60	17	43	27	3	5	5	83	23	17	3	3	8

QUESTION 50.—Need for Corps of Engineers to improve its public channels of communication (public hearings not well publicized)

Total	117	13	21	32	16	6	12	75	5	2	3	2	21
National meeting	57	9	12	33	21	7	18	68	4	4	4	4	30
Regional meeting	60	16	30	30	12	5	7	82	7	0	2	0	13

QUESTION 51.—Need for National Park Service to better articulate and communicate its decisionmaking process to the public as well as being more responsive to public testimony

Total	117	15	27	33	11	7	7	82	3	7	1	4	15
National meeting	57	12	19	35	12	9	13	75	4	9	2	7	23
Regional meeting	60	18	38	32	10	5	2	88	3	5	0	2	7

QUESTION 52.—Need for Bureau of Land Management to improve its channels of communication with State and local public sectors as well as the private sector

Total	117	9	27	37	11	7	9	76	7	17	9	10	18
National meeting	57	7	23	33	10	11	16	65	5	19	7	9	30
Regional meeting	60	11	32	40	12	3	2	87	8	15	10	12	7

QUESTION 53.—Need for a mechanism by which representative segments of the industry can provide inputs to development of Federal policies and programs on tourism development on an ongoing basis

Total	117	55	24	13	1	0	7	84	9	23	15	50	7
National meeting	57	60	17	12	0	0	11	82	7	5	2	47	11
Regional meeting	60	50	30	15	2	0	3	85	12	40	27	53	3

QUESTION 54.—Need to alleviate the negative impact of low user charges for Federal recreation facilities on competing private sector facilities loacted in adjacent or nearby areas (unsubsidized private facilities must collect higher use charges)

	Percentage base	Importance rating						Who should be responsible					
		Very important	Important	Somewhat important	Not very important	Not at all important	No opinion	Federal Government	Regional commission	State government	City/local government	Private sector	No opinion
Total	117	18	23	26	16	8	9	79	8	13	7	28	14
National meeting	57	17	16	26	18	7	16	74	7	5	7	25	21
Regional meeting	60	18	30	27	15	8	2	83	8	20	7	32	7

QUESTION 55.—Need for assessment of negative impacts of Federal regulations and rulings on tourism industry Development efforts prior to promulgation (i.e., need for preparation of a tourism impact Statement by Federal agencies)

Total	117	48	34	8	3	2	5	90	7	16	8	26	7
National meeting	57	53	33	5	2	0	7	93	9	16	9	35	7
Regional meeting	60	43	35	10	5	3	4	87	5	17	7	18	7

QUESTION 56.—Need for National Park Service and U.S. Forest Service programs to support rather than constrain tourism facilities development on public lands under their administration

Total	117	17	32	30	4	8	9	87	2	8	3	10	12
National meeting	57	19	25	32	5	5	14	84	4	11	2	16	16
Regional meeting	60	15	38	28	4	10	5	90	0	5	3	5	8

QUESTION 57.—Need for relaxation of EPA nondegradation air quality standards to allow tourism facility development in some areas

Total	117	9	18	24	18	22	9	80	3	11	3	5	16
National meeting	57	11	14	28	14	19	14	74	5	11	2	7	23
Regional meeting	60	8	22	20	22	25	3	87	2	12	5	3	10

QUESTION 58.—Need to develop specific and explicit criteria as to when and where Federal agencies should intervene to directly develop/manage tourism resources/attractions

Total	117	22	24	30	8	9	7	84	4	21	8	20	12
National meeting	57	21	19	30	9	10	11	79	4	11	4	21	18
Regional meeting	60	23	28	30	8	7	4	88	5	30	12	18	7

QUESTION 59.—Need an independent body to review impact of Federal programs on tourism development

Total	117	28	27	15	10	13	7	52	9	13	7	47	18
National meeting	57	30	30	14	7	7	12	56	9	12	2	46	18
Regional meeting	60	27	25	15	13	18	2	48	8	13	12	48	18

QUESTION 60.—Need to eliminate double taxation of dividends in the tourism industry to promote greater capital investment

Total	117	29	29	15	9	7	11	83	0	19	8	12	13
National meeting	57	33	28	7	9	4	19	79	0	11	0	11	21
Regional meeting	60	25	30	22	10	10	3	87	0	27	15	13	5

QUESTION 61.—Need for review of provisions of mutual aid pact among domestic U.S. airlines

Total	117	10	15	22	15	22	16	66	2	4	2	21	26
National meeting	57	9	16	21	10	26	18	60	0	5	4	26	30
Regional meeting	60	10	15	23	20	17	15	72	3	3	0	15	23

QUESTION 62.—Need to amend Taft-Hartley Act to require an employer who assumes ownership or operation of a business to honor the terms and conditions of a collective bargaining contract

Total	117	4	10	19	13	39	15	52	0	6	2	20	34
National meeting	57	2	9	16	10	42	21	42	0	7	2	23	40
Regional meeting	60	6	12	22	15	37	8	62	0	5	2	17	28

QUESTION 63.—Need to revise minimum wage restrictions which prevent greater hiring of unskilled youths and minority workers by the tourism/travel industry

Total	117	19	23	14	20	13	11	71	1	21	4	17	24
National meeting	57	23	21	10	19	9	18	67	0	21	2	19	32
Regional meeting	60	16	25	17	20	17	5	75	2	22	7	15	17

QUESTION 64.—Need revision of State legal barriers restricting interstate bus transport

Total	117	19	18	26	14	8	15	54	4	54	0	9	21
National meeting	57	17	14	28	16	2	23	51	2	47	0	11	28
Regional meeting	60	20	22	25	13	13	7	57	7	60	0	7	13

QUESTION 65.—Need to revise 55 mi/h speed limit for intercity buses

	Percentage base	Importance rating						Who should be responsible					
		Very important	Important	Somewhat important	Not very important	Not at all important	No opinion	Federal Government	Regional commission	State government	City/local government	Private sector	No opinion
Total	117	2	9	14	25	44	6	46	0	31	9	4	35
National meeting	57	3	3	16	30	37	11	44	0	28	11	7	39
Regional meeting	60	1	13	12	20	52	2	48	0	33	7	2	32

PROMOTION

QUESTION 1.—Need for better funded USTS promotion of the United States in leading foreign tourism markets (e.g., Canada, Mexico, Western Europe, Japan)

Total	117	60	23	10	1	3	3	94	5	7	2	12	4
National meeting	57	53	24	12	0	4	7	88	5	7	2	18	9
Regional meeting	60	66	22	8	2	2	0	100	5	7	2	7	0

QUESTION 2.—Need Federal matching funds programs for tourism promotion by State/local governments similar to matching funds programs for development of tourism and recreational facilities

Total	117	37	26	18	7	9	3	78	9	40	14	9	14
National meeting	57	26	26	23	11	9	5	74	5	44	11	12	18
Regional meeting	60	47	27	13	3	10	0	82	12	37	17	7	10

QUESTION 3.—Need to expand intransit customs clearance program to major foreign visitor markets

Total	117	28	35	20	9	1	7	92	2	3	1	3	8
National meeting	57	26	32	23	7	0	12	86	2	2	0	2	14
Regional meeting	60	30	38	18	10	2	2	98	2	5	2	5	2

QUESTION 4.—Need greater funding and staffing for U.S. Embassies and Consulates in major foreign visitor markets to facilitate nonimmigrant visa approvals

Total	117	17	24	33	14	3	9	87	0	0	0	0	13
National meeting	57	14	21	37	10	4	14	81	0	0	0	0	19
Regional meeting	60	20	27	30	17	3	3	93	0	0	0	0	7

QUESTION 5.—Need for commitment on the part of high Federal officials to improve (through education) the attitudes of Federal, State, and local government employees toward international visitors

Total	117	40	29	15	6	4	6	88	10	32	22	12	9
National meeting	57	46	28	9	3	2	12	82	9	33	23	12	16
Regional meeting	60	35	30	22	8	5	0	93	12	30	22	12	3

QUESTION 6.—Need a higher priority for tourism among State Department offices and commercial officers of the Department of Commerce overseas

Total	117	50	28	17	2	0	3	93	0	5	2	3	4
National meeting	57	52	23	16	2	0	7	89	0	4	0	2	9
Regional meeting	60	47	33	18	2	0	0	97	0	7	3	5	0

QUESTION 7.—Need greater U.S. representation at international meetings on tourism promotion and development

Total	117	31	32	24	5	3	5	83	6	12	5	27	9
National meeting	47	38	21	17	9	4	11	79	4	4	2	26	18
Regional meeting	60	23	43	30	2	2	0	87	8	20	8	28	2

QUESTION 8.—Need to improve training, behavior, and attitudes of U.S. Customs and Immigration officials to facilitate foreign visitor clearance

Total	117	44	27	19	3	1	6	91	0	2	1	2	8
National meeting	57	40	28	12	7	2	11	86	0	0	0	2	14
Regional meetings	60	46	27	25	0	0	2	97	0	3	2	2	2

QUESTION 9.—Need more effective professional promotion by USTS and USIA of the United States as a destination in major foreign visitor markets

Total	117	51	26	13	2	3	5	92	3	4	2	10	6
National meeting	57	49	23	12	2	5	9	88	0	4	0	12	11
Regional meeting	60	53	30	13	2	0	2	97	5	5	3	8	2

QUESTION 10.—Need more effective informational programs for visitors to national parks, including more informative printed materials and better distribution of such materials

Total	117	14	33	39	8	1	5	84	6	13	3	7	9
National meeting	57	10	30	35	14	2	9	77	5	9	2	11	18
Regional meeting	60	16	37	43	2	0	2	90	7	17	3	3	2

QUESTION 11.—Need for Federal promotional activities to be based on adequate and sound market research

Total	117	40	41	11	3	0	5	91	2	9	3	15	17
National meeting	57	33	37	16	5	0	9	88	0	5	0	11	12
Regional meeting	60	46	45	7	0	0	2	95	3	12	5	18	2

QUESTION 12.—CAB rulings need to be more consistent and administrative hearing process needs to be streamlined

	Percentage base	Importance rating						Who should be responsible					
		Very important	Important	Somewhat important	Not very important	Not at all important	No opinion	Federal Government	Regional commission	State government	City/local government	Private sector	No opinion
Total	117	32	32	16	5	2	13	84	0	1	0	4	16
National meeting	57	24	31	18	4	2	21	77	0	0	0	7	23
Regional meeting	60	40	31	15	7	2	5	90	0	2	0	2	10

QUESTION 13.—Need for intraagency (Federal Highway Administration) clarification of Highway Beautification Act signing policies and improved administration of program

Total	117	28	21	28	10	3	10	83	3	17	1	8	15
National meeting	57	16	24	26	12	4	18	74	2	11	0	9	23
Regional meeting	60	40	18	30	7	2	3	92	5	23	2	7	7

QUESTION 14.—USTS matching-fund program procedures need to be simplified and easier to understand

Total	117	23	31	25	7	7	7	84	4	9	3	5	15
National meeting	57	10	37	26	11	4	12	77	4	7	4	7	21
Regional meeting	60	35	27	23	3	10	2	90	5	12	3	3	8

QUESTION 15.—Need better public access to USIA (USIS) offices overseas and depoliticization of the Agency's procedures to improve tourism promotion efforts

Total	117	23	30	24	6	5	12	82	1	2	1	3	17
National meeting	57	17	28	30	4	2	19	75	0	2	0	4	25
Regional meeting	60	28	32	18	8	9	5	88	2	2	2	3	10

QUESTION 16.—Need more up-to-date, informative maps and guides for the Nation's highways, urban areas, etc.

Total	117	15	26	33	14	5	7	59	15	52	26	33	12
National meeting	57	14	14	35	18	5	14	53	9	37	16	35	21
Regional meeting	60	17	38	30	10	5	0	65	22	67	35	32	3

QUESTION 17.—Need for adoption of uniform information descriptors of tourism facilities on informational signs and for greater use of internationally recognized symbols

Total	117	33	36	20	3	0	8	83	14	50	26	25	10
National meeting	57	40	26	18	4	0	12	79	18	39	25	32	16
Regional meeting	60	27	45	23	2	0	3	87	10	62	28	18	5

QUESTION 18.—Need for Federal promotion of travel to and within specific regions of the country versus specific States

Total	117	13	31	20	17	13	6	66	32	13	6	9	20
National meeting	57	7	23	19	25	14	12	58	25	12	4	12	30
Regional meeting	60	18	40	20	10	12	0	73	38	13	8	5	10

QUESTION 19.—Need for Federal promotion emphasizing the attractions of specific sites and tourism/recreational facilities

Total	117	8	15	33	17	20	7	62	10	15	7	12	23
National meeting	57	11	12	33	16	14	14	60	7	16	5	18	28
Regional meeting	60	5	18	33	19	25	0	65	13	13	8	7	18

QUESTION 20.—Need to focus greater promotional efforts on nontravelers versus experienced travelers

Total	117	13	37	29	10	6	5	57	21	39	19	44	15
National meeting	57	12	35	23	14	5	11	56	18	28	16	47	23
Regional meeting	60	13	38	35	7	7	0	58	23	50	22	40	8

QUESTION 21.—Need for greater promotion of "weekend" tourism into less developed areas of the country

Total	117	14	25	29	16	9	7	32	25	43	24	44	20
National meeting	57	10	16	31	23	9	11	33	18	33	14	37	25
Regional meeting	60	18	33	27	10	8	4	32	32	52	33	52	15

QUESTION 22.—Need for greater promotion of "national heritage" and "historical" attractions

Total	117	13	31	34	10	5	7	59	24	52	31	32	17
National meeting	57	12	25	32	12	7	12	54	18	37	21	26	26
Regional meeting	60	13	37	37	8	3	2	63	30	67	40	38	8

QUESTION 23.—Need greater support for promotion of fly/drive and other innovative travel package programs

	Percentage base	Importance rating						Who should be responsible					
		Very important	Important	Somewhat important	Not very important	Not at all important	No opinion	Federal Government	Regional commission	State government	City/local government	Private sector	No opinion
Total	117	14	27	32	15	5	7	39	15	32	17	63	15
National meeting	57	18	19	25	19	7	12	35	11	18	11	61	23
Regional meeting	60	10	35	40	10	3	2	43	20	47	23	65	8

QUESTION 24.—Need for technical assistance to local communities to help in promoting unique local characteristics

Total	117	11	26	32	18	3	10	22	19	51	38	24	17
National meeting	57	5	12	38	25	4	16	21	12	33	35	18	30
Regional meeting	60	16	40	25	12	2	5	23	25	68	42	30	5

QUESTION 25.—Need licensing of retail travel agents, travel wholesalers, and tour brokers to insure professional promotion of travel opportunities

Total	117	20	21	18	16	16	9	50	3	38	7	19	23
National meeting	57	17	16	12	19	18	18	49	4	25	7	25	30
Regional meeting	60	23	25	23	14	15	0	52	2	52	7	13	17

QUESTION 26.—Need support for adoption of uniform local school vacations to coincide with Monday holidays, Labor Day ending of summer travel season, and summer school sessions to alleviate winter off-season problems, et cetera

Total	117	18	25	20	21	11	5	49	6	56	27	9	16
National meeting	57	14	23	17	23	12	11	46	11	49	19	9	23
Regional meeting	60	22	27	23	18	10	0	52	2	63	35	8	10

QUESTION 27.—Need for greater promotion of international fairs and sporting events in the United States

Total	117	14	25	32	10	10	9	63	13	34	20	37	17
National meeting	57	10	18	30	14	12	16	51	14	30	16	35	28
Regional meeting	60	16	32	35	7	8	2	75	12	38	23	38	7

QUESTION 28.—Need for more widespread development of State tourism information centers

Total	117	18	30	26	9	6	11	16	5	79	10	9	18
National meeting	57	9	23	33	12	5	18	11	4	70	7	9	26
Regional meeting	60	26	37	18	7	7	5	22	7	87	13	10	10

QUESTION 29.—Need for regional commissions to allocate funds for tourism promotion on the Regional/State level

Total	117	15	31	22	9	15	8	19	66	28	7	3	22
National meeting	57	2	24	30	12	18	14	16	61	23	2	5	26
Regional meeting	60	26	37	15	7	13	2	22	70	33	12	2	18

QUESTION 30.—Need greater consideration of impacts on the tourism/travel industry in promulgation of CAB rulings and regulations

Total	117	29	35	20	3	2	11	85	3	3	2	15	13
National meeting	57	31	25	21	2	2	19	77	0	0	0	14	21
Regional meeting	60	27	45	18	5	2	3	92	5	5	3	15	5

QUESTION 31.—Need greater promotion of off-season (winter) tourism

Total	117	31	35	15	9	5	5	40	26	52	29	63	12
National meeting	57	23	37	16	9	5	10	42	23	37	16	54	21
Regional meeting	60	38	33	15	9	5	0	38	30	67	42	72	3

QUESTION 32.—Need a more equitable system for allocating Federal matching funds for State/local domestic and international promotional programs which will not penalize States and regions with small tourism budgets

Total	117	18	29	19	17	4	13	76	9	27	15	5	20
National meeting	57	10	18	26	18	5	23	65	12	25	11	5	30
Regional meeting	60	25	40	12	17	3	3	87	7	30	18	5	10

QUESTION 33.— Need for greater development of educational and career training programs in the tourism and travel field in technical schools, colleges, and universities

Total	117	12	40	26	9	3	10	20	10	62	21	47	15
National meeting	57	7	38	21	11	4	19	23	12	42	14	46	27
Regional meeting	60	16	42	30	7	3	2	17	8	82	27	48	7

89-959—77——13

QUESTION 34.—Need for greater dissemination of information on the full range of tourism opportunities available for different economic levels of the population (particularly for the economically disadvantaged)

	Percentage base	Importance rating						Who should be responsible					
		Very important	Important	Somewhat important	Not very important	Not at all important	No opinion	Federal Government	Regional commission	State government	City/local government	Private sector	No opinion
Total	117	7	28	35	17	4	9	46	15	43	27	38	15
National meeting	57	0	19	39	19	5	18	49	11	28	21	33	23
Regional meeting	60	13	37	32	15	3	0	43	18	57	33	43	8

QUESTION 35.—Need more detailed, accurate, and reliable consumer information in travel promotion materials in the public and private sector (e.g., cost breakdown on tour packages, etc.)

Total	117	9	32	31	14	5	9	28	6	25	11	68	15
National meeting	57	10	24	25	12	11	18	26	5	11	7	60	26
Regional meeting	60	8	40	37	15	0	0	30	7	38	15	77	5

QUESTION 36.—Need development of more effective and responsive legal and institutional mechanisms for consumer redress on travel/tourism complaints and problems

Total	117	7	26	38	17	4	8	48	3	42	15	40	15
National meeting	57	7	17	37	16	7	16	44	5	28	14	26	23
Regional meeting	60	7	33	38	18	2	2	52	2	55	17	35	7

QUESTION 37.—Need for greater promotion of group travel to conserve fuel

Total	117	16	44	17	9	3	11	56	14	28	12	51	18
National meeting	57	17	33	14	14	4	18	49	14	19	9	58	25
Regional meeting	60	15	53	20	3	4	5	63	13	37	15	45	12

QUESTION 38.—Need for greater promotion of travel on U.S. airlines versus foreign airlines

Total	117	19	26	22	12	12	9	54	6	9	3	56	21
National meeting	57	21	21	18	12	12	16	51	4	9	4	53	26
Regional meeting	60	16	30	27	12	12	3	57	8	8	3	60	17

QUESTION 39.—Need promotional efforts in foreign tourism markets aimed at altering the image of the United States as an expensive international tourism desitnation

Total	117	41	31	14	4	1	9	86	5	15	3	46	10
National meeting	57	38	21	16	5	2	18	74	4	11	2	44	21
Regional meeting	60	43	40	13	4	0	0	98	7	18	5	48	0

QUESTION 40.—Need inclusion of tourism promotion materials in U.S. Information Service overseas film program

Total	117	24	40	21	3	2	10	84	3	8	5	8	15
National meeting	57	23	31	23	5	0	18	77	0	4	0	5	23
Regional meeting	60	25	48	18	2	3	4	90	5	12	10	10	8

QUESTION 41.—Need for revision of counterpart funds law and P.S. 480 to permit use of blocked funds for international promotion of travel to the United States by USTS and USIA

Total	117	22	23	26	8	3	18	76	0	2	0	2	24
National meeting	57	19	25	19	14	0	23	72	0	2	0	2	28
Regional meeting	60	25	21	32	2	7	13	80	0	2	0	2	20

QUESTION 42.—Need public and private sector programs to assist the economically disadvantaged to travel

Total	117	2	11	30	29	19	9	44	7	28	12	46	27
National meeting	57	3	7	32	23	19	16	42	5	19	11	33	35
Regional meeting	60	2	15	28	35	18	2	47	8	37	13	58	20

QUESTION 43.—Need financial and technical support to disseminate basic consumer information on how to travel (to overcome fear of travel among nontraveling population)

Total	117	10	21	30	19	10	10	45	9	25	12	51	21
National meeting	57	14	12	26	14	16	18	37	5	11	5	49	32
Regional meeting	60	7	28	33	23	5	4	53	12	38	18	53	10

QUESTION 44.—Need for coordination among USTS, Immigration, Customs, and the CAB concerning scheduling of flight arrivals and Immigration and Customs personnel at airports to facilitate foreign visitor entry

Total	117	32	32	19	4	3	10	88	3	4	1	19	11
National meeting	57	30	28	17	4	2	19	79	2	2	0	26	21
Regional meeting	60	33	37	20	5	3	2	97	3	7	2	12	2

QUESTION 45.—Need greater coordination between CAB and other regulatory agencies whose activities have an impact on the tourism/travel industry

	Percentage base	Importance rating						Who should be responsible					
		Very important	Important	Somewhat important	Not very important	Not at all important	No opinion	Federal Government	Regional commission	State government	City/local government	Private sector	No opinion
Total	117	37	43	10	3	2	5	93	1	3	2	13	7
National meeting	57	37	31	14	5	2	11	86	2	4	2	21	14
Regional meeting	60	36	55	7	0	2	0	100	0	3	2	5	0

QUESTION 46.—Need better coordination between Federal agencies involved in tourism promotion and those involved in tourism development

Total	117	42	36	13	2	2	5	87	4	13	4	19	8
National meeting	57	37	30	17	3	4	9	79	4	9	2	26	14
Regional meeting	60	48	42	8	0	0	2	95	5	17	7	12	2

QUESTION 47.—Need to better coordinate Federal site-specific promotional programs with private sector promotional programs to insure an expansion of the total tourism market rather than simply competition for the same tourism dollar expenditure

Total	117	27	38	16	5	4	10	80	9	18	8	54	15
National meeting	57	23	35	17	4	2	19	72	9	7	2	46	23
Regional meeting	60	31	40	13	7	7	2	88	10	28	13	62	7

QUESTION 48.—Need for a uniform promotion policy and better coordination of promotional activities among USTS, USIA, and other agencies and U.S. offices abroad having some responsibility for International visitor promotion

Total	117	39	28	23	1	1	8	90	1	3	1	11	9
National meeting	57	35	23	26	2	2	12	84	0	5	0	14	16
Regional meeting	60	43	33	20	0	0	4	95	2	2	2	8	3

QUESTION 49.—Need for coordinated national dissemination of State/local promotional materials with State/local focus

Total	117	16	28	27	16	7	6	49	23	63	39	27	15
National meeting	57	10	24	32	16	7	11	40	23	58	32	21	21
Regional meeting	60	21	32	23	15	7	2	57	23	68	47	33	8

QUESTION 50.—Need greater regional/state/local cooperation on promotional efforts

Total	117	24	43	17	5	3	8	23	54	74	53	27	11
National meeting	57	12	38	28	4	4	14	26	53	61	46	21	19
Regional meeting	60	35	48	6	7	2	2	20	55	87	60	33	3

QUESTION 51.—Need better channels of communication between USTS and State promotional agencies (particularly with respect to preparation and approval of technical assistance proposals)

Total	117	20	37	25	5	4	9	73	9	59	9	5	15
National meeting	57	12	32	28	7	5	16	67	5	54	9	7	25
Regional meeting	60	27	42	22	3	3	3	78	12	63	10	3	7

QUESTION 52.—Need for USTS international offices to be more accessible to the general public

Total	117	24	38	17	5	3	13	80	3	1	0	3	18
National meeting	57	19	34	19	5	5	18	79	2	0	0	5	21
Regional meeting	60	28	42	15	5	2	8	82	3	2	0	2	15

QUESTION 53.—Need to develop better facilities for visitor access and informational services at each Federal agency involved in the tourism field

Total	117	16	34	29	10	0	11	85	1	1	0	3	14
National meeting	57	14	26	31	11	0	18	77	0	0	0	7	21
Regional meeting	60	18	40	27	10	0	5	92	2	2		0	7

QUESTION 54.—Need for mechanism by which representative segments of the industry can provide inputs to development of Federal policies and programs on tourism promotion on an ongoing basis (e.g., labor unions providing inputs to USTS)

Total	117	30	32	18	8	3	9	79	6	17	12	45	14
National meeting	57	35	26	16	9	0	14	81	4	9	4	39	14
Regional meeting	60	25	38	20	7	5	5	77	8	25	20	52	13

QUESTION 55.—Need to alter regulations on highway informational signing under the Highway Beautification Act to permit small businesses to effectively promote their services among the traveling public

Total	117	20	15	18	17	21	9	72	4	32	9	26	19
National meeting	57	12	14	18	19	23	14	65	5	25	9	18	26
Regional meeting	60	28	17	18	15	18	4	78	3	38	10	35	12

QUESTION 56.—Need to revise cab regulations on airline incentive fares, air charters, etc., to stimulate greater travel within the United States

	Percentage base	Importance rating						Who should be responsible					
		Very important	Important	Somewhat important	Not very important	Not at all important	No opinion	Federal Government	Regional commission	State government	City/local government	Private sector	No opinion
Total	117	37	32	15	4	3	9	85	1	2	0	22	12
National meeting	57	30	28	17	3	4	18	77	0	0	0	18	21
Regional meeting	60	43	35	12	5	3	2	93	2	3	0	27	3

QUESTION 57.—Need to eliminate Visa requirements for nonimmigrant visitors from major foreign tourism markets granting reciprocal privileges to U.S. citizens

Total	117	31	34	12	3	9	11	85	1	0	0	3	15
National meeting	57	30	37	10	0	7	16	79	0	0	0	5	21
Regional meeting	60	31	32	13	7	10	7	90	2	0	0	0	10

QUESTION 58.—Need to evaluate impact on domestic tourism on recent IRS ruling limiting permissible tax deductions for foreign convention travel and if impact is significant, need to reestablish former IRS interpretation

Total	117	38	28	18	8	3	9	86	2	6	6	15	12
National meeting	57	49	14	12	7	2	16	81	0	7	5	18	19
Regional meeting	60	27	33	23	10	5	2	92	3	5	7	13	5

QUESTION 59.—Need to evaluate impact on travel promotion of IRS plan to change tax status of local chambers of commerce and if impact is significant, need to maintain exempt status

Total	117	36	26	16	11	3	8	83	1	9	15	17	14
National meeting	57	30	19	16	16	3	16	77	0	7	16	16	23
Regional meeting	60	41	32	17	7	3	0	88	2	10	13	18	5

QUESTION 60.—Need assessment of possible negative impacts of Federal regulations and rulings on tourism industry promotional efforts prior to promulgation (e.g., licensing of tour brokers, cab regulations, etc.)

Total	117	38	36	16	2	0	8	90	2	10	3	28	9
National meeting	57	38	25	19	2	0	16	84	2	5	2	26	16
Regional meeting	60	37	47	13	3	0	0	95	2	15	5	30	2

QUESTION 61.—Need to reconsider and possible revise unfavorable reciprocal agreements on customs/travel promotion regulations and restrictions with Canada

Total	117	36	32	18	3	2	9	88	1	4	3	4	12
National meeting	57	30	21	24	4	2	19	77	0	4	0	5	23
Regional meeting	60	41	43	12	2	2	0	98	2	5	5	3	2

QUESTION 62.—Need to insure that Federal emergency energy allocations and contingency planning accord the tourism/travel industry equal priority with other major industries

Total	117	74	12	7	2	0	5	91	3	15	6	26	1
National meeting	57	77	7	5	2	0	9	89	4	11	4	25	17
Regional	60	17	71	8	2	0	2	93	3	20	8	27	3

QUESTION 63.—Need an independent body to review impact of Federal programs on tourism promotion

Total	117	30	25	21	7	10	7	54	10	10	7	43	21
National meeting	57	25	33	16	9	5	12	63	5	7	4	37	21
Regional meeting	60	35	16	27	5	15	2	45	15	13	10	48	20

QUESTION 64.—Need to revise CAB regulations and rulings that stimulate americans to choose foreign airlines over U.S. airlines

Total	117	26	27	19	10	9	9	79	0	1	0	24	17
National meeting	57	19	27	19	7	12	16	70	0	0	0	23	26
Regional meeting	60	32	28	18	13	7	2	87	0	2	0	25	8

QUESTION 65.—Need to promote more effectively the quality of life benefits associated with tourism and travel among the general public and Federal, State, and local officials

Total	117	38	31	18	4	2	7	76	32	52	44	50	10
National meeting	57	24	33	21	4	4	14	75	32	44	39	46	16
Regional meeting	60	50	28	15	5	2	0	77	33	60	48	53	5

PART II

Federal Programs Related to Tourism and Travel

U.S. TRAVEL SERVICE

QUESTION 1A.—Domestic travel promotion within the United States

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	86	12	2	54	32	14	28	1	27	44	39	16	30	48	4	31	20	45
National meeting	57	84	12	4	51	31	18	24	0	32	44	28	9	37	51	3	32	21	44
Regional meeting	60	88	12	0	56	32	12	32	2	23	43	50	23	23	45	5	3	18	47

QUESTION 1A.—Domestic travel promotion within the United States (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	59	0	0	22	3	2	22	0	0	0	2	3	2	46
National meeting	30	0	0	33	3	3	17	0	0	0	0	3	3	40
Regional meeting	29	0	0	10	3	0	28	0	0	0	3	4	0	52

[1] Programs fail to address important needs of the industry.

QUESTION 1B.—Foreign travel promotion to the United States

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	86	10	4	62	26	12	53	2	10	35	44	26	38	40	13	37	13	37
National meeting	57	84	9	7	65	23	12	58	3	7	32	40	25	53	37	14	42	12	32
Regional meeting	60	88	10	2	60	28	12	48	0	13	39	47	27	25	43	12	33	13	42

QUESTION 1B.—Foreign travel promotion to the United States (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	59	0	0	31	2	0	10	0	10	0	0	0	7	47
National meeting	31	0	0	39	3	0	10	0	10	0	0	0	0	48
Regional meeting	28	0	0	21	0	0	11	0	11	0	0	0	14	46

[1] Programs fail to address important needs of the industry.

U.S INFORMATION AGENCY

QUESTION 2A.—Educational and cultural exchange programs

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	79	18	3	31	49	20	25	1	7	67	16	14	15	72	6	18	5	71
National meeting	57	77	16	7	28	51	21	23	2	5	70	12	12	16	75	5	17	4	74
Regional meeting	60	80	20	0	33	48	19	27	0	10	63	20	15	13	68	7	18	7	68

QUESTION 2A.—Education and cultural exchange programs (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	27	0	0	7	7	7	19	0	4	0	0	0	4	59
National meeting	12	0	0	8	8	0	25	0	0	0	0	0	8	58
Regional meeting	15	0	0	7	7	13	13	0	7	0	0	0	0	60

[1] Programs fail to address important needs of the industry.

QUESTION 2B.—Since February 1974, USIA has provided information support for U.S. tourism programs abroad

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	59	34	7	26	35	39	14	0	15	71	17	10	14	77	4	14	9	73
National meeting	57	60	33	7	26	35	39	11	0	19	70	14	7	19	77	2	14	10	74
Regional meeting	60	58	35	7	27	35	38	18	0	10	72	20	13	8	77	6	15	7	72

QUESTION 2B.—Since February 1974, USIA has provided information support for U.S. tourism programs aborad (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	27	0	0	7	11	4	19	11	4	0	0	0	4	48
National meeting	14	0	0	14	7	0	21	7	0	0	0	0	6	50
Regional meeting	13	0	0	0	15	8	15	15	8	0	0	0	0	46

[1] Programs fail to address important needs of the industry.

QUESTION 3A.—IMMIGRATION AND NATURALIZATION SERVICES AND BUREAU OF SECURITY AND CONSULAR AFFAIRS

Administration of immigration laws and clearance of foreign visitors

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	85	11	4	43	44	13	12	27	4	57	26	19	26	63	4	16	21	59
National meeting	57	88	5	7	56	35	9	16	33	5	46	26	21	39	56	5	23	25	47
Regional meeting	60	83	17	0	30	53	17	8	20	3	69	25	17	15	70	2	10	18	70

QUESTION 3A.—Administration of immigration laws and clearance of foreign visitors (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	44	0	0	7	5	5	50	5	2	0	0	9	0	39
National meeting	27	0	0	7	7	4	37	4	4	0	0	0	0	44
Regional meeting	17	0	0	6	0	6	71	6	0	0	0	0	0	29

[1] Programs fail to address important needs of the industry.

QUESTION 3B.—Screening and processing of visa applications

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	69	26	5	28	44	28	8	20	2	70	16	10	16	78	4	8	18	70
National meeting	57	72	19	9	42	33	25	14	24	2	60	16	12	25	72	5	14	25	56
Regional meeting	60	66	32	2	15	53	32	2	15	3	80	17	8	8	83	3	2	12	83

QUESTION 3B.—Screening and processing of visa applications (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	30	0	0	3	10	10	53	3	3	0	0	0	0	23
National meeting	22	0	0	5	14	5	55	5	5	0	0	0	0	23
Regional meeting	8	0	0	0	0	25	50	0	0	0	0	0	0	25

[1] Programs fail to address important needs of the industry.

BUREAU OF THE CENSUS

QUESTION 4.—National travel survey

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	86	11	3	57	28	15	36	4	18	42	44	27	36	49	12	31	14	43
National meeting	57	81	14	5	46	31	23	24	4	21	51	30	16	32	60	10	25	14	51
Regional meeting	60	92	8	0	67	25	8	47	5	15	33	58	38	40	38	13	37	13	37

QUESTION 4.—National travel survey (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	52	0	0	2	6	0	15	2	2	0	33	0	2	50
National meeting	22	0	0	5	0	0	23	0	5	0	32	0	5	45
Regional meeting	30	0	0	0	10	0	10	3	0	0	33	0	0	53

[1] Programs fail to address important needs of the industry.

FEDERAL ENERGY ADMINISTRATION

QUESTION 5.—Energy conservation and rationing programs

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	93	5	2	68	23	9	14	49	8	29	46	44	55	38	2	16	50	32
National meeting	57	91	5	4	70	18	12	14	54	5	27	37	35	58	39	2	16	54	28
Regional meeting	60	95	5	0	67	28	5	15	43	10	32	55	52	52	37	1	17	45	37

QUESTION 5.—Energy conservation and rationing programs (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	77	6	0	4	30	21	6	4	6	1	0	1	5	18
National meeting	40	3	0	8	38	15	3	3	3	0	0	3	10	20
Regional meeting	37	11	0	0	22	27	11	5	11	3	0	0	0	16

[1] Programs fail to address important needs of the industry.

BUREAU OF OUTDOOR RECREATION

QUESTION 6A.—Nationwide outdoor recreation plan

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	63	35	2	29	36	35	23	2	6	69	21	15	11	74	8	12	7	73
National meeting	57	47	49	4	17	32	51	12	0	7	81	11	14	11	84	5	5	5	85
Regional meeting	60	78	22	0	40	40	20	33	3	5	59	32	17	12	65	12	18	8	62

QUESTION 6A.—Nationwide outdoor recreation plan (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	22	0	0	5	23	5	23	5	9	0	0	0	0	36
National meeting	6	0	0	0	33	17	17	17	17	0	0	0	0	17
Regional meeting	16	0	0	6	19	0	25	0	6	0	0	0	0	44

[1] Programs fail to address important needs of the industry.

QUESTION 6B.—Land and Water Conservation Fund

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	60	37	3	30	32	38	27	2	3	68	22	17	6	72	14	10	6	70
National meeting	57	42	51	7	19	23	58	14	5	4	77	14	9	9	81	11	7	5	77
Regional meeting	60	77	23	0	40	40	20	40	0	2	58	30	25	3	63	17	13	7	63

QUESTION 6B.—Land and Water Conservation Fund (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	19	0	5	21	11	5	5	5	11	0	0	0	0	42
National meeting	7	0	14	0	14	0	14	14	14	0	0	0	0	43
Regional meeting	12	0	0	33	8	8	0	0	9	0	0	0	0	42

[1] Programs fail to address important needs of the industry.

NATIONAL PARK SERVICE

QUESTION 7A.—Operation of the National Park System

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	90	7	3	54	36	10	51	3	1	45	46	23	24	50	26	21	4	49
National meeting	57	86	9	5	47	37	16	44	5	0	51	39	16	26	58	26	16	5	53
Regional meeting	60	95	5	0	60	35	5	58	2	2	38	53	30	22	42	25	27	3	45

QUESTION 7A.—Operation of the National Park System (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	30	0	0	17	20	0	10	0	3	0	0	0	7	47
National meeting	12	0	0	17	42	0	17	0	0	0	0	0	0	33
Regional meeting	18	0	0	17	5	0	5	0	6	0	0	0	11	56

[1] Programs fail to address important needs of the industry.

QUESTION 7B.—National Register of Historic Places

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	83	13	4	44	36	20	41	0	7	52	35	36	18	55	17	27	3	53
National meeting	57	72	19	9	24	44	32	24	0	4	72	19	18	16	75	14	12	2	72
Regional meeting	60	93	7	0	63	28	9	57	0	10	33	50	53	20	35	20	42	3	35

QUESTION 7B.—National Register of Historic Places (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	35	0	0	14	9	0	11	0	9	0	0	0	0	57
National meeting	8	0	0	12	12	0	13	0	13	0	0	0	0	50
Regional meeting	27	0	0	15	7	0	11	0	8	0	0	0	0	59

[1] Programs fail to address important needs of the industry.

Question 7C.—Administration of private concessions in national parks

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	81	15	4	29	51	20	19	11	2	68	18	9	21	70	6	13	11	70
National meeting	57	77	14	9	28	47	25	16	14	3	67	12	2	23	72	5	12	11	72
Regional meeting	60	85	15	0	30	55	15	22	8	2	68	23	17	20	68	7	13	12	68

QUESTION 7C.—Administration of private concessions in national parks (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	28	0	4	4	11	0	29	7	14	4	0	0	4	32
National meeting	13	0	0	0	15	0	39	0	15	8	0	0	0	31
Regional meeting	15	0	7	7	7	0	20	13	13	0	0	0	7	33

[1] Programs fail to address important needs of the industry.

U.S. FOREST SERVICE

QUESTION 8A.—National Forest System recreation program

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	79	17	4	32	47	21	32	2	3	63	29	16	17	68	18	12	5	65
National meeting	57	72	21	7	23	47	30	24	2	2	72	19	9	16	79	14	9	3	74
Regional meeting	60	87	13	0	40	47	13	40	2	3	55	38	23	18	57	21	15	7	57

QUESTION 8A.—National Forest System recreation program (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	20	0	0	5	10	10	20	10	10	0	0	0	0	40
National meeting	7	0	0	0	14	14	29	14	0	0	0	0	0	29
Regional meeting	13	0	0	8	8	8	15	8	15	0	0	0	0	46

[1] Programs fail to address important needs of the industry.

QUESTION 8B.—U.S. Forest Service research program

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	35	53	12	11	28	61	11	0	2	87	9	3	4	90	5	5	0	90
National meeting	57	28	54	18	7	26	67	9	0	0	91	7	4	5	93	7	2	0	91
Regional meeting	60	41	52	7	15	30	55	13	0	3	84	10	2	3	87	3	8	0	89

Question 8B.—U.S. Forest Service research program (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	6	0	0	0	16	0	0	0	0	0	0	0	17	67
National meeting	1	0	0	0	0	0	0	0	0	0	0	0	0	100
Regional meeting	5	0	0	0	20	0	0	0	0	0	0	0	20	60

[1] Programs fail to address important needs of the industry.

BUREAU OF LAND MANAGEMENT

QUESTION 9.—Development and administration of national resource lands

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	57	39	4	14	43	43	11	0	2	87	13	6	8	86	2	11	1	86
National meeting	57	47	44	9	11	35	54	7	0	4	89	11	5	9	89	0	11	0	89
Regional meeting	60	65	35	0	16	52	32	15	0	0	85	15	7	7	83	3	12	2	83

QUESTION 9.—Development and administration of national resource lands (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	14	0	0	7	21	7	14	7	7	7	0	0	14	21
National meeting	6	0	0	16	17	0	0	0	0	0	0	0	17	50
Regional meeting	8	0	0	0	25	13	25	13	13	13	0	0	13	0

[1] Programs fail to address important needs of the industry.

U.S. FOREST SERVICE/NATIONAL PARK SERVICE/BUREAU OF LAND MANAGEMENT/ETC.

QUESTION 10.—National wilderness preservation system

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	74	23	3	27	45	28	23	6	0	71	24	10	15	73	14	9	5	72
National meeting	57	67	26	7	19	44	37	16	7	0	77	18	9	16	81	10	4	7	79
Regional meeting	60	80	20	0	35	45	20	30	5	0	65	30	12	13	65	17	15	3	65

QUESTION 10.—National wilderness preservation system (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	17	0	0	0	18	18	18	12	6	0	0	0	12	24
Naional meeting	6	0	0	0	33	33	0	17	0	0	0	0	17	0
Regional meeting	11	0	0	0	9	9	27	9	9	0	0	0	9	36

[1] Programs fail to address important needs of the industry.

COOPERATIVE STATE RESEARCH SERVICE

QUESTION 11.—Grant program for rural development, forestry, recreation

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	37	60	3	9	33	58	8	0	1	91	8	6	3	91	3	6	0	91
National meeting	57	32	61	7	9	30	61	9	0	0	91	7	7	4	93	4	5	0	91
Regional meeting	60	42	58	0	10	35	55	6	0	2	92	8	5	3	90	1	7	0	92

QUESTION 11.—Grant program for rural development, forestry. recreation (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of .ederal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	7	0	0	14	0	0	0	0	14	0	0	0	15	57
National meeting	3	0	0	0	0	0	0	0	0	0	0	0	33	67
Regional meeting	4	0	0	25	0	0	0	0	25	0	0	0	0	50

[1] Programs fail to address important needs of the industry.

U.S. ARMY CORPS OF ENGINEERS

QUESTION 12.—Development and operation of multipurpose water resource projects and facilities

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	74	23	3	37	37	26	25	12	2	61	31	26	25	61	5	16	18	61
National meeting	57	63	32	5	19	46	35	9	10	0	81	14	14	12	82	2	5	12	81
Regional meeting	60	85	15	0	55	28	17	40	13	3	44	47	37	37	40	8	27	23	42

QUESTION 12.—Development and operation of multipurpose water resource projects and facilities (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	40	3	0	3	13	3	38	3	13	0	0	3	5	33
National meeting	10	0	0	0	10	0	60	0	20	0	0	0	0	30
Regional meeting	30	3	0	3	13	3	30	3	10	0	0	7	7	33

[1] Programs fail to address important needs of the industry.

SMALL BUSINESS ADMINISTRATION

QUESTION 13.—Development assistance to small businesses

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	87	10	3	36	49	15	28	4	5	63	10	15	25	67	10	15	11	64
National meeting	57	86	9	5	28	54	18	24	2	4	79	7	11	23	75	7	14	9	70
Regional meeting	69	88	12	0	43	45	12	31	5	7	57	13	18	27	58	13	15	13	59

QUESTION 13.—Development assistance to small businesses (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	30	0	0	10	13	0	33	0	0	0	0	0	0	44
National meeting	13	0	0	8	8	0	38	0	0	0	0	0	0	46
Regional meeting	17	0	0	12	18	0	29	0	0	0	0	0	0	41

[1] Programs fail to address important needs of the industry.

ECONOMIC DEVELOPMENT ADMINISTRATION

QUESTION 14.—Development assistance to underdeveloped areas

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	64	62	4	31	32	37	19	4	7	70	18	18	17	72	7	13	7	73
National meeting	57	56	39	5	21	33	46	16	2	3	79	12	11	12	81	5	11	5	79
Regional meeting	60	71	27	2	40	32	28	21	7	10	62	23	25	22	63	8	15	8	69

QUESTION 14.—Development assistance to underdeveloped areas (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	23	0	4	17	4	4	22	4	4	0	0	0	0	48
National meeting	9	0	11	11	0	11	11	0	0	0	0	0	0	56
Regional meeting	14	0	40	21	7	0	29	7	7	0	0	0	0	43

[1] Programs fail to address important needs of the industry.

COMMUNITY PLANNING AND DEVELOPMENT

QUESTION 15.—Community development block grant assistance and comprehehsive planning assistance

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	62	34	4	20	43	37	14	2	4	80	8	15	2	81	6	10	3	81
National meeting	57	46	47	7	9	38	53	5	0	4	91	2	3	0	95	0	7	0	93
Regional meeting	60	78	22	0	31	47	22	22	3	5	70	13	25	3	68	12	13	5	70

QUESTION 15.—Community development block grant assistance and comprehensive planning assistance (ask only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	15	0	0	13	20	0	13	0	7	7	0	0	7	60
National meeting	4	0	0	0	0	0	0	0	0	0	0	0	25	75
Regional meeting	11	0	0	18	27	0	18	0	9	9	0	0	0	55

[1] Programs fail to address important needs of the industry.

EXTENSION SERVICE

QUESTION 16.—Technical assistance tourism and recreation businesses

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	44	52	4	16	27	57	14	2	1	83	11	10	11	85	4	8	3	85
National meeting	57	42	51	7	9	31	60	11	0	0	89	5	5	7	91	2	7	0	91
Regional meeting	60	47	53	0	23	23	54	18	3	2	77	17	15	15	78	7	10	5	78

QUESTION 16.—Technical assistance to tourism and recreation businesses (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	13	0	0	15	16	0	0	0	0	0	0	0	0	69
National meeting	4	0	0	0	0	0	0	0	0	0	0	0	0	100
Regional meeting	9	0	p	22	22	0	0	0	0	0	0	0	0	56

[1] Programs fail to address important needs of the industry.

ENVIRONMENTAL PROTECTION AGENCY

QUESTION 17A.—Air and waste management programs

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	83	14	3	36	46	18	19	11	5	65	21	19	24	69	10	11	10	69
National meeting	57	81	14	5	35	44	21	19	16	4	61	21	19	26	68	12	11	12	65
Regional meeting	60	85	15	0	37	48	15	18	7	7	68	20	18	22	70	8	12	8	72

QUESTION 17A.—Air and waste management programs (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	25	4	0	4	8	12	28	0	0	8	0	0	8	48
National meeting	13	0	0	0	8	8	31	0	0	15	0	0	15	46
Regional meeting	12	8	0	8	8	17	25	0	0	0	0	0	0	50

[1] Programs fail to address important needs of the industry.

QUESTION 17B.—Water and hazardous materials programs

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	74	22	4	32	42	26	19	10	3	68	21	18	21	74	10	14	6	70
National meeting	57	72	23	5	31	39	30	23	12	0	65	19	18	23	72	11	12	9	68
Regional meeting	60	76	22	2	32	45	23	15	8	5	72	22	18	18	75	10	15	3	72

QUESTION 17B.—Water and hazardous materials programs (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	23	4	0	0	0	4	26	4	0	4	0	0	9	57
National meeting	12	0	0	0	0	8	33	0	0	8	0	0	17	50
Regional meeting	11	9	0	0	0	0	18	9	0	0	0	0	0	64

[1] Programs fail to address important needs of the industry.

QUESTION 17C.—Environmental impact statement process

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	86	10	4	48	38	14	16	31	3	50	32	31	38	56	9	10	28	53
National meeting	57	79	12	9	47	30	23	14	35	2	49	28	26	39	58	5	9	33	53
Regional meeting	60	93	7	0	48	45	7	18	27	3	52	35	35	37	53	12	12	23	53

QUESTION 17C.—Environmental impact statement process (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	45	4	0	0	7	20	40	4	2	7	0	0	4	27
National meeting	24	0	0	0	8	13	38	4	0	8	0	0	8	42
Regional meeting	21	10	0	0	5	29	43	5	5	5	0	0	0	10

[1] Programs fail to address important needs of the industry.

OCCUPATIONAL SAFETY AND HEALTH ADMINISTRATION

QUESTION 18.—Regulation of occupational safety and health conditions

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	90	8	2	45	44	11	10	27	9	54	18	18	35	58	2	18	25	55
National meeting	57	86	9	5	49	35	16	12	30	7	51	19	19	37	56	0	23	26	51
Regional meeting	60	93	7	0	41	52	7	8	25	10	57	17	17	33	60	5	13	23	59

QUESTION 18.—Regulation of occupational safety and health conditions (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	50	4	0	0	6	2	36	2	2	4	0	2	8	44
National meeting	28	4	0	0	7	4	36	4	0	7	0	0	7	43
Regional meeting	22	5	0	0	5	0	36	0	5	0	0	5	9	45

[1] Programs fail to address important needs of the industry.

QUESTION 19.—Interstate Commerce Commission regulation of interstate surface transportation

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	86	10	4	32	53	15	14	14	3	69	19	15	22	73	4	10	16	70
National meeting	57	82	9	9	30	54	16	14	12	2	72	9	9	21	77	4	12	12	72
Regional meeting	60	88	12	0	35	52	13	15	15	3	67	28	22	23	68	5	8	18	69

QUESTION 19.—Regulation of interstate surface transportation (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	30	0	0	0	13	3	40	0	0	0	0	0	0	44
National meeting	14	0	0	0	21	0	22	0	0	0	0	0	0	57
Regional meeting	16	0	0	0	6	6	56	0	0	0	0	0	0	32

[1] Programs fail to address important needs of the industry.

QUESTION 20A.—Federal Highway Administration Federal aid highway program

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	89	7	4	38	50	12	36	2	1	61	32	26	20	64	17	15	3	65
National meeting	57	82	9	9	21	60	19	25	0	0	75	19	16	16	79	10	11	0	79
Regional meeting	60	95	5	0	55	40	5	47	3	2	48	43	35	23	50	23	20	5	52

QUESTION 20A.—Federal aid highway program (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	21	0	0	0	0	5	0	9	5	0	0	5	5	71
National meeting	6	0	0	0	0	0	0	0	0	0	0	0	17	83
Regional meeting	15	0	0	0	0	6	0	13	7	0	0	7	0	67

[1] Programs fail to address important needs of the industry.

QUESTION 20B.—Highway beautification program

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	93	3	4	50	43	7	28	20	4	48	33	28	34	52	14	15	20	51
National meeting	57	89	4	7	38	51	11	23	16	5	56	26	21	30	61	12	14	16	58
Regional meeting	60	97	3	0	62	35	3	33	23	4	40	40	35	38	43	15	17	23	45

QUESTION 20B.—Highway beautification program (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	41	2	0	10	17	15	24	2	15	0	0	0	7	22
National meeting	17	6	0	6	18	18	12	0	18	0	0	0	0	29
Regional meeting	24	0	0	13	17	13	33	4	13	0	0	0	13	17

[1] Programs fail to address important needs of the industry.

FEDERAL AVIATION ADMINISTRATION

QUESTION 21.—Airport planning and development programs

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	83	14	3	33	51	16	27	3	3	67	23	24	20	71	13	17	2	68
National meeting	57	75	18	7	31	46	23	26	3	4	67	23	23	23	74	16	14	3	67
Regional meeting	60	90	10	0	33	57	10	28	3	2	67	23	25	17	68	10	20	2	68

QUESTION 21.—Airport planning and development programs (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	23	0	0	9	13	0	13	0	0	0	0	0	0	70
National meeting	10	0	0	10	30	0	0	0	0	0	0	0	0	60
Regional meeting	13	0	0	8	0	0	23	0	0	0	0	0	0	77

[1] Programs fail to address important needs of the industry.

CIVIL AERONAUTICS BOARD

QUESTION 22.—Promotion and regulation of the U.S. air transport industry

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	87	9	4	53	34	13	26	20	3	51	32	27	37	53	2	30	19	49
National meeting	57	84	9	7	49	35	16	26	19	2	53	23	19	39	60	0	30	19	51
Regional meeting	60	90	10	0	57	33	10	27	20	3	50	40	35	35	47	3	30	20	47

QUESTION 22.—Promotion and regulation of the U.S. air transport industry (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of ederal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	58	0	3	2	2	5	31	0	3	2	0	5	5	50
National meeting	28	0	4	0	4	7	21	0	4	0	0	7	7	57
Regional meeting	30	0	3	3	0	3	40	0	3	3	0	3	3	43

[1] Programs fail to address important needs of the industry.

NATIONAL RAILROAD PASSENGER CORPORATION (AMTRAK)

QUESTION 23.—Amtrak

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	95	2	3	65	31	4	33	16	14	37	45	39	38	44	7	29	29	35
National meeting	57	91	4	5	54	39	7	30	16	7	47	35	28	37	53	5	30	23	42
Regional meeting	60	98	2	0	75	23	2	36	17	20	27	55	50	38	37	8	28	35	29

QUESTION 23.—Amtrak (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	68	0	1	12	4	1	26	1	4	16	0	6	4	41
National meeting	30	0	3	7	3	0	20	0	0	23	0	7	3	50
Regional meeting	38	0	0	16	5	3	32	3	8	11	0	5	5	34

[1] Programs fail to address important needs of the industry.

INTERNAL REVENUE SERVICE (DEPARTMENT OF THE TREASURY)

QUESTION 24.—Corporate and individual deductions for conventions and other travel

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	83	10	7	56	27	17	25	26	3	46	25	21	38	52	8	17	25	50
National meeting	57	79	10	11	58	19	23	14	37	5	44	23	16	39	53	2	12	35	51
Regional meeting	60	87	10	3	53	35	12	35	17	0	48	27	27	37	52	13	22	15	50

QUESTION 24.—Corporate and individual deductions for conventions and other travel (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	49	0	0	2	20	22	8	0	0	2	0	0	22	35
National meeting	27	0	0	0	26	33	11	0	0	4	0	0	26	22
Regional meeting	22	0	0	4	14	9	5	0	0	0	0	0	18	50

[1] Programs fail to address important needs of the industry.

FEDERAL TRADE COMMISSION

QUESTION 25.—Promotion of fair competition in interstate commerce and consumer protection

	Percentage base	Aware	Not aware	No opinion	Have experience	No experience	No opinion	Positive impact	Negative impact	Little or no impact at all	No opinion	Regional/ State	City/ local	Private sector	No opinion	Very satisfied	Somewhat satisfied	Not satisfied	No opinion
Total	117	85	11	4	38	45	17	25	6	7	62	15	15	28	68	9	17	10	64
National meeting	57	84	7	9	46	37	17	28	7	11	54	16	14	35	61	7	25	12	56
Regional meeting	60	85	15	0	30	53	17	22	5	3	70	15	15	22	73	10	10	8	72

QUESTION 25.—Promotion of fair competition in interstate commerce and consumer protection (asked only of those who say somewhat satisfied/not satisfied)

	Percentage base	Impact on the economy	Discourages competition	Insufficiency of current Federal commitment	Ill-designed program objectives [1]	Unnecessary or undesirable impacts of Federal program activities	Inefficient administration of current programs	Poor coordination of program	Poor channels of communication	Programs are too costly	Studies need to be conducted more frequently	Should be left to private enterprise	Other answers	Don't know/ no answer
Total	32	0	9	0	6	6	16	0	3	9	0	0	9	53
National meeting	21	0	0	0	5	10	14	0	0	14	0	0	10	57
Regional meeting	11	0	27	0	9	0	18	0	9	0	0	0	9	45

[1] Programs fail to address important needs of the industry.