

LOOKING BACK (2014/2015) LOOKING FORWARD (2030) TO THE WORLD WIDE TOURISM!¹

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The tourism development meets the needs of present tourists and host regions while protecting and enhancing opportunity for the future. It is envisaged as leading to the management of all resources in such a way that economic, social, and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, and biological diversity and life support systems (WTO 1995).

Various international agencies (WTO, UNEP) have called upon the tourism industry to develop environmentally, socially and culturally compatible forms of tourism. They are also seeking to continue the development and implementation of voluntary initiatives in support of sustainable tourism development, bearing in mind that such forms of tourism and initiatives should meet, or preferably exceed, relevant local, national, regional or international standards.

For tourism development to have sustainable outcomes, business operations must be sustainable. Sustainable development for business means "adopting business strategies and activities that meet the needs of the enterprise and its stakeholders today while protecting, sustaining, and enhancing the human and natural resources that will be needed in the future" (International Institute for Sustainable Development 1994:4).

The sustainable business has interdependent economic, environmental, and social objectives and understands that long-term viability depends on integrating all three objectives in decision-making. Rather than regarding social and environmental objectives as costs, a sustainable enterprise seeks opportunities for profit in achieving these goals (IISD 1994:4)

LOOKING BACK

An ever-increasing number of destinations worldwide have opened up to, and invested in tourism, turning it into a key driver of socio-economic progress through the creation of jobs and enterprises, export revenues, and infrastructure development.

Over the past six decades, tourism has experienced continued expansion and diversification, to become one of the largest and fastest-growing economic sectors in the world. Many new destinations have emerged in addition to the traditional favorites of Europe and North America.

Despite occasional shocks, tourism has shown virtually uninterrupted growth. International tourist arrivals have increased from 25 million globally in 1950, to 278 million in 1980, 527 million in 1995, and 1133 million in 2014. Likewise, international tourism receipts earned by destinations worldwide have surged from US\$ 2 billion in 1950 to US\$ 104 billion in 1980, US\$ 415 billion in 1995 and US\$ 1245 billion in 2014.

International tourist arrivals worldwide are expected to increase by 3.3% a year between 2010 and 2030 to reach 1.8 billion by 2030, according to UNWTO's long term forecast Tourism Towards 2030.

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Between 2010 and 2030, arrivals in emerging destinations (+4.4% a year) are expected to increase at twice the rate of those in advanced economies (+2.2% a year).

The market share of emerging economies increased from 30% in 1980 to 45% in 2014, and is expected to reach 57% by 2030, equivalent to over 1 billion international tourist arrivals.

THE MOST IMPORTANT PHENOMENON – TOURIST ARRIVALS INCREASED

International tourist arrivals (overnight visitors) hit a record 1133 million worldwide in 2014, up from 1087 million in 2013. Demand continued to be strong in most source markets and destinations, despite ongoing geopolitical, economic and health challenges in some parts of the world. With 46 million more tourists travelling the world (+4.3%), 2014 marks the fifth consecutive year of robust growth above the long-term average (+3.3% a year) since the financial crisis of 2009.

Europe (+3%) led growth in absolute terms, welcoming 15 million more international tourists in 2014 to reach a total 582 million arrivals. The Americas recorded the fastest relative growth across all UNWTO regions with an 8% increase in international arrivals to reach 181 million – 13 million more than in 2013. Asia and the Pacific saw an increase of 5%, equivalent to 14 million more tourists, taking the regional total to 263 million arrivals.

International tourism in the Middle East (+5%) rebounded after two years of decline, posting good results in most destinations. The region attracted 3 million more international tourists than in 2013, bringing the total to an estimated 51 million. Africa's international tourist numbers grew by an estimated 2%, equivalent to an increase of one million arrivals, to reach a total of 56 million tourists.

In 2015 growth is expected to continue at a sustained rate of 3% to 4% worldwide. By UNWTO region, prospects for 2015 are strongest for Asia and the Pacific and the Americas (both +4% to +5%), followed by Europe (+3% to +4%).

In Africa (+3% to +5%) and the Middle East (+2% to +5%), prospects are positive but more uncertain and volatile.

BY CAR, BY TRAIN OR BY PLANE ?

In 2014, slightly over half of all overnight visitors travelled to their destination by air (54%), while the remainder travelled by surface transport (46%) – whether by road (39%), rail (2%) or water (5%). The trend over time has been for air transport to grow at a somewhat faster pace than surface transport, thus the share of air transport is gradually increasing.

Travel for holidays, recreation and other forms of leisure accounted for just over half of all international tourist arrivals (53% or 598 million) in 2014. Some 14% of international tourists reported travelling for business and professional purposes, and another 27% travelled for other reasons such as visiting friends and relatives (VFR), religious reasons and pilgrimages, health treatment etc. The purpose of visit for the remaining 6% of arrivals was not specified.

LOOKING FORWARD

UNWTO Tourism Towards 2030 is UNWTO's long-term outlook and an assessment of the development of tourism over the two decades from 2010 to 2030. It is a broad research project, building on UNWTO's ongoing work in the field of long-term forecasting which was initiated in the

1990s. This study replaces the earlier Tourism 2020 Vision, which has become a worldwide reference for international tourism forecasts.

Key outputs of Tourism Towards 2030 are quantitative projections for international tourism demand over a 20-year period, with 2010 as the base year, and ending in 2030. The updated forecast has been enriched with an analysis of the social, political, economic, environmental and technological factors that have shaped tourism in the past, and which are expected to influence the sector in the future.

According to Tourism Towards 2030, the number of international tourist arrivals worldwide is expected to increase by an average of 3.3% a year over the period 2010 to 2030. Over time, the rate of growth will gradually slow, from 3.8% at the beginning of the period to 2.9% in 2030, but this is on top of growing base numbers. In absolute numbers, international tourist arrivals will increase by some 43 million a year, compared with an average increase of 28 million a year during the period 1995 to 2010. At the projected rate of growth, international tourist arrivals worldwide are expected to reach 1.4 billion by 2020 and 1.8 billion by the year 2030.

International tourist arrivals in the emerging economy destinations of Asia, Latin America, Central and Eastern Europe, Eastern Mediterranean Europe, the Middle East and Africa will grow at double the rate (+4.4% a year) of that in advanced economy destinations (+2.2% a year). As a result, arrivals in emerging economies are expected to exceed those in advanced economies before 2020. In 2030, 57% of international arrivals will be in emerging economy destinations (versus 30% in 1980) and 43% in advanced economy destinations (versus 70% in 1980).

The strongest growth by region will be seen in Asia and the Pacific, where arrivals are forecast to increase by 331 million to reach 535 million in 2030 (+4.9% per year). The Middle East and Africa are also expected to more than double their number of arrivals in this period, from 61 million to 149 million and from 50 million to 134 million respectively. Europe (from 475 million to 744 million) and the Americas (from 150 million to 248 million) will grow comparatively more slowly.

Thanks to their faster growth, the global market shares of Asia and the Pacific (to 30% in 2030, up from 22% in 2010), the Middle East (to 8%, from 6%) and Africa (to 7%, from 5%) will all increase. As a result, Europe (to 41%, from 51%) and the Americas (to 14%, from 16%) will experience a further decline in their share of international tourism, mostly because of the slower growth of the comparatively mature destinations in North America, Northern Europe and Western Europe.