Commission de l'OMT pour l’Europe
Cinquante-quatrième réunion
Batoumi (Géorgie), 9 mai 2012

Point 4 de l’ordre du jour provisoire

PROGRAMME GÉNÉRAL DE TRAVAIL

Le tourisme à l’horizon 2030

Note du Secrétaire général

Le Secrétaire général transmet aux Membres la Commission pour l’Europe le document sur le Tourisme à l’horizon 2030, qui sera présenté au cours de la réunion de la Commission pour l’Europe.
Tourism Towards 2030

Advance release

54th Meeting of the UNWTO Commission for Europe
9-10 May 2012
Batumi, Georgia

UNWTO
Tourism 2020 Vision vs. actual trend

World

International tourist arrivals

- Tourism 2020 Vision forecast
- Actual 1995-2010*

- 1995: 528 mn
- 2000: 881 mn
- 2005: 940 mn
- 2010: 940 mn

Source: World Tourism Organization (UNWTO)
Tourism Towards 2030

- A broad research project of long-term forecasting, following up on work initiated by UNWTO in the 1990s
- Objectives:
  - Assist UNWTO Members in formulating policies and long-term strategic plans
  - Provide a global reference on future tourism development
  - Reinforce UNWTO’s role in agenda setting for tourism-related subjects
  - Constitute a reference for UNWTO strategic documents, programme of work and activities
- Central to the study are the projections for international tourism flows in the two decades 2010-2030
  - Data series on international tourist arrivals as reported by destination countries are used as the key indicator, taking into account subregion of destination, region of origin, mode of transport and purpose of visit for the period 1980-2010
  - The quantitative forecast is based on a causal econometric model with international tourist arrivals as the dependent variable. Two independent variables are used: 1) growth of Gross Domestic Product (GDP), a proxy for traveller affluence and business travel potential; 2) cost of transport.
World
Growth in international tourism will continue, but at a more moderate pace.

Average growth 2010-2030
3.3% a year

2010-2020
3.8% a year

2020-2030
2.9% a year

source: World Tourism Organization (UNWTO) ©
International tourist arrivals to increase by 43 million a year on average
International tourist arrivals to reach 1.8 billion by 2030

source: World Tourism Organization (UNWTO) ©
Emerging economy destinations to surpass advanced destinations in 2015

Inbound tourism, advanced and emerging economies

International Tourist Arrivals, million

emerging economies
advanced economies

source: World Tourism Organization (UNWTO) ©
Asia and the Pacific will gain most of the new arrivals

Inbound tourism by region of destination

International Tourist Arrivals, million

source: World Tourism Organization (UNWTO) ©
Asia and the Pacific, the Middle East and Africa to increase their shares

1980 (277 mn)
- Americas: 23%
- Asia and the Pacific: 8%
- Europe: 63%
- Middle East: 3%
- Africa: 3%

2010 (940 mn)
- Americas: 16%
- Asia and the Pacific: 22%
- Europe: 41%
- Middle East: 6%
- Africa: 5%

2030 (1.8 bn)
- Americas: 14%
- Asia and the Pacific: 30%
- Europe: 41%
- Middle East: 8%
- Africa: 7%
No major change in share by purpose of visit

International tourism by purpose of visit

- Leisure, recreation and holidays
- VFR, health, religion, other
- Business and professional

source: World Tourism Organization (UNWTO) ©
Air transport will continue to increase market share, but at a slower pace.
Travel between regions continues to grow slightly faster than within the same region.
What if assumptions change?

Tourism Towards 2030: global projection and sensitivity analysis

Actual data 1980-2010
Transport costs continue to fall (scenario 3)
Central projection
Faster rising cost of transport (scenario 2)
A slower-than-expected economic recovery and future growth (Scenario 1)

International Tourist Arrivals, million

Source: World Tourism Organization (UNWTO) ©
Global growth in international tourist arrivals to continue, but at a more moderate pace, from 4.2% per year (1980–2020) to 3.3% (2010–2030), as a result of four factors:

- The base volumes are higher, so smaller % increases still add substantial numbers
- Lower GDP growth, as economies mature
- A lower elasticity of travel to GDP
- A shift from falling transport costs to increasing ones

Tourism Towards 2030 shows that there is still a great potential for further expansion in coming decades; emerging as well as established destinations can benefit from this trend and opportunity, provided they shape the adequate conditions and policies with regard to business environment, infrastructure, facilitation, marketing and human resources.

Along with opportunities, challenges also arise in maximising social and economic benefits and minimising negative impacts.

Long-term tourism growth pattern: more moderate, sustainable and inclusive.
Opportunities and challenges: how to make it possible

Five key areas that mark the future:

- For many countries tourism represents a powerful tool for social and economic development and the reduction of poverty through the creation of job and enterprises, infrastructure development and the export revenues earned.
- In order to tap into this potential, it is essential to continue creating and raising awareness and to mainstream tourism in the political agenda.
- Sustainability (social, economic and environment) is more important than ever, addressing issues such as energy dependency, climate change adaptation and mitigation, green economy, congestion management and risk management.
- Keep track of the changing consumer: more experienced and demanding customers, demographic change (ageing, migration and diversification of family structure), changing values and lifestyles, from service economy to experience economy, etc.
- Enhance competitiveness by shaping an adequate business environment: innovation, diversification of products, markets and segments, product development, ICT and technology in general, marketing and promotion, research, evaluation, human resources development, quality, etc.
Thank you very much for your attention!

World Tourism Organization (UNWTO)

www.unwto.org