

A world map is visible in the background, rendered in a light blue color against a darker blue background. The map shows the outlines of continents and is overlaid with a grid of latitude and longitude lines. The text is centered horizontally over the map.

Tourism Towards 2030 / Global Overview



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Foreword

Taleb Rifai / UNWTO Secretary-General



Following three years of intensive research, we are pleased to present the results of UNWTO's new long term forecast for international tourism – *Tourism Towards 2030*. We trust that the conclusions of this landmark report will assist UNWTO Members and all tourism stakeholders in understanding changes and trends and formulating the appropriate policies and strategies to build a more competitive and sustainable tourism sector.

The last six decades have seen extraordinary growth for tourism. In spite of the multiple changes and shocks –from man-made crises, to natural disasters and economic crises, from which the world is still recovering– tourism, although vulnerable, has always bounced back, proving its resilience and capacity to rebound.

The next two decades will be of sustained growth for the tourism sector. International tourist arrivals are set to increase by an average 43 million a year between 2010 and 2030.

At the projected pace of growth, we will surpass the 1 billion mark by 2012, up from 940 million in 2010. By 2030, the number is anticipated to reach 1.8 billion meaning that in two decades' time, 5 million people will cross international borders for leisure, business or other purposes such as visiting friends and family every day, besides the four times as many tourists traveling domestically.

There will also be much change beyond the numbers. Future arrivals will be spread more widely across the globe; the share of international tourism to emerging economies

will surpass that to advanced ones, and many of the new arrivals will be to destinations in Asia, Latin America, Central and Eastern Europe, Africa and the Middle East.

The future brings enormous opportunities for tourism to take centre stage in the political and economic agenda, seeking recognition for its contribution to economic growth and development. It also brings added challenges and responsibilities for our sector to take the lead in mitigating its potential negative impacts on host communities and the environment.

Tourism has evolved into a global phenomenon – one of the most important economic sectors and social activities of our time. Today, it contributes directly to 5% of the world's GDP, one in 12 jobs globally and is a major export sector for many countries, both in the developing and developed world.

The next 20 years will be of continued growth for the sector. They can also be years of leadership: tourism leading economic growth, social progress and environmental sustainability. To make this possible we need to make tourism a priority in national policy decisions, foster competitive and responsible business models and practises and increase cooperation between the public and private sectors.

Benjamin Franklin said "by failing to prepare, you are preparing to fail". *Tourism Towards 2030* aims to help prepare us in the most effective way to make the most out of the opportunities for the tourism sector and take a leadership role in the path towards fairer, stronger and more sustainable growth. ◀



Introduction

Background and Objectives

Tourism Towards 2030 is a broad research project in continuation of UNWTO's work in the area of long-term forecasting initiated in the 1990s. It aims at the following objectives:

- Assisting UNWTO Members in formulating policies and long-term strategic plans;
- Providing a global reference on tourism future development;
- Reinforcing UNWTO's role in agenda setting for tourism-related subjects;
- Constituting a reference for UNWTO strategic documents, programme of work and activities.

The latest UNWTO project in this area was *Tourism 2020 Vision*, elaborated in the late 1990s and published in 2001, with 1995 as base year. This study has since become a worldwide reference in terms of international tourism forecast for UNWTO Members (Member States, associate and affiliate Members), the international tourism community (including local governments, private sector, academia, consultant firms and others), media and the public at large.

The aim of *Tourism Towards 2030* is to update projections through 2030, and to enrich forecasts with an overview of the social, political, economic, environmental and technological factors, which shaped tourism in the past, and are expected to lead development and growth in the future.

What and how do we forecast: modelling tourism demand

For the quantitative forecast, a causal model has been constructed with international tourist arrivals as the dependent variable and using growth of Gross Domestic Product (GDP), a proxy for traveller affluence and business travel potential, and cost of transport as independent variables.

International tourist arrivals (international visitors that stay overnight) as reported by destination countries are used as the key indicator for tourism demand. This is one of the very few tourism indicators with long, consistent series for all (sub)regions (which is not the case for other series such as domestic arrivals, nights, etc.). This series can be broken down by trip characteristics such as destination, origin, mode of transport and purpose of visit. Economic data such as receipts generally cannot be broken down