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**“International Tourism:
where we are, where we are going”**

by Taleb Rifai

“Il turismo internazionale: dove siamo e dove stiamo andando”

di Taleb Rifat[§]

Negli ultimi anni si è assistito a dei cambiamenti straordinari: dalle economie emergenti salite alla ribalta alla crisi mondiale fino ai cambiamenti geopolitici.

Il turismo nel mondo, se misurato in termini di arrivi internazionali, marca costantemente risultati positivi grazie alla compensazione delle performance negative di alcune aree - com'è accaduto per il Sud dell'Europa in un momento particolarmente complesso per i paesi dell'Africa settentrionale - con quelle positive di altre.

Se il 2012 sarà un anno storico con il superamento della soglia del miliardo di persone a viaggiare nei dodici mesi, le previsioni UNWTO per il 2030 quasi raddoppiano tale numero, attestandosi su 1,8 miliardi di turisti nel mondo. Si prevedono pertanto 43 milioni in più di turisti ogni anno, contro i 28 del periodo 1995-2010. E saranno

i cosiddetti paesi emergenti, secondo l'organizzazione, a ricevere più turisti di quelli ad economia avanzata, con una conseguente minor concentrazione degli arrivi nelle diverse aree mondiali, una perdita di quota per le Americhe e l'Europa, benché quest'ultima manterrà il primato in termini di quota di mercato e rapporto tra arrivi turistici e popolazione residente.

Ma tale crescita, che ha creato e creerà presupposti per migliorare le condizioni di vita di moltissime popolazioni, andrà gestita al meglio per evitare impatti negativi muovendosi nel rispetto dei principi di sviluppo sostenibile, garantendo un uso corretto delle risorse ambientali ed il rispetto dell'autenticità socioculturale delle popolazioni locali, ed evitando una concentrazione eccessiva dei benefici economici.

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“International Tourism: where we are, where we are going”

by Taleb Rifai¹

1. Introduction

2011 was a challenging year. The economic recovery, which many felt so promising in 2010, became increasingly uncertain in 2011, especially in the world’s advanced economies. The picture was further compounded by events such as the tragic earthquake and tsunami in Japan and the changes in the Middle East and North Africa.

Despite these conditions, international tourism managed to grow, and grow strongly. International tourist arrivals grew by over 4%, reaching a record 980 million.

For a sector directly representing 5% of the world’s GDP, 6% of total exports and employing millions of people in advanced and emerging economies alike these results are

encouraging as they come at a moment in which we urgently need levers to stimulate global growth and job creation

Against all odds, Europe was the strongest growing region last year. Southern European destinations performed particularly well, benefiting somewhat, but not only, from the shift of travel away from the Middle East and North Africa.

So tourism was actually one of the economic sectors growing steadily in 2011. Indeed, despite a dip in 2009, international tourism has survived the economic storm relatively unscathed. Trips abroad whether for business, leisure or other motives are clearly something few are willing to sacrifice, even in – or especially during – times of hardship. Trends

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might change in terms of length of stay or choice of destination, but once more, tourism has demonstrated its resilience and ability to adjust to market changes and has grown accordingly.

2. What to expect from 2012

It is true that 2012 holds increased uncertainty. Yet, given the trends of 2011, UNWTO forecasts growth in international tourism to consolidate at between 3-4%. Moreover, this year is something of a milestone; for the first time in history, one billion people will travel internationally in a single year.

These tourists, visiting developed and developing countries alike, bring enormous opportunities for foreign exchange, jobs, infrastructure and development.

This is no time for complacency, however. At the beginning of last year, few could have predicted the extent to which economic

recovery would stall in 2011, particularly in Europe.

Tourism is closely tied to the health of the global economy and, as we welcome in 2012, the sector is faced with an uncertain scenario. Unacceptably high levels of unemployment and low consumer and business confidence are placing considerable pressure on tourism demand, while austerity measures and credit constraints in many major markets hinder supply. Throughout the last couple of years, it became clear that it was those destinations and those companies that could be flexible enough to rapidly adjust that would see through the crisis and even grow. International tourism must therefore keep a close eye on the global economy in 2012, adjusting accordingly to changing market and consumer trends.

Major events, including the FIFA World Cup in South Africa in 2010, were also key in maintaining and increasing tourism numbers.

In 2012, the Olympics in the UK and the UEFA European Football Championship in Poland and Ukraine should do the same for the countries involved, as well as their neighbors.

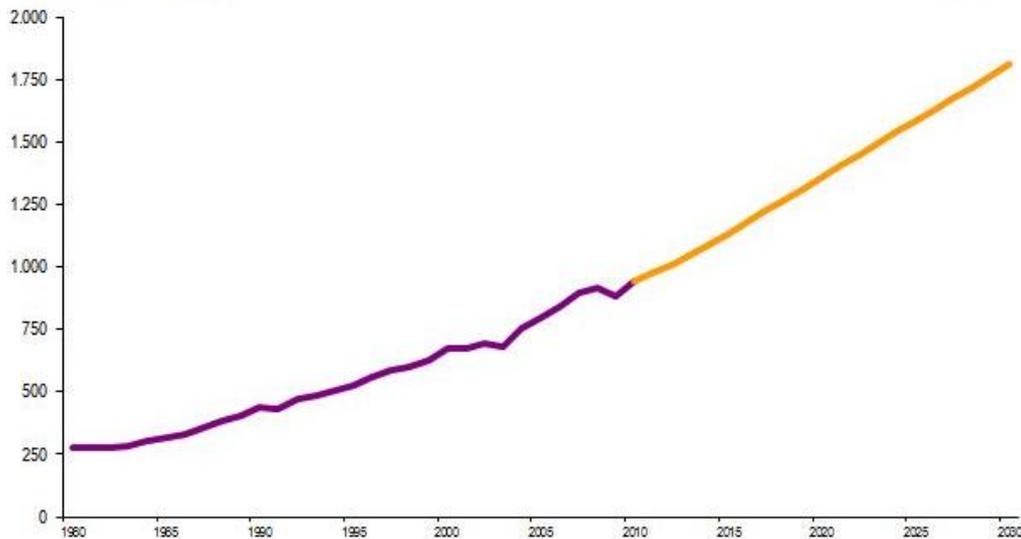
In sum, tourism has a long history of crises and shocks, from economic turmoil to natural disasters. Yet the sector has shown extraordinary growth and resilience since emerging as a global phenomenon in the

middle of the twentieth century. I am confident this time will prove no different.

3. Looking Ahead: Tourism Towards 2030

In 2011 UNWTO released the report *Tourism Towards 2030*, an in-depth assessment of the development of international tourism over the next two decades. The study shows that by 2030 1.8 billion people will be traveling the world.

Graf. 1 – *International tourism, tourism arrivals (millions)*



Source: *Tourism Towards 2030*, World Tourism Organization (UNWTO)

This means an average 43 million more international travelers entering the market each year; an increase equal to the total international tourist arrivals received today by major destinations such as Italy. Although average growth between now and 2030 is slightly more moderate than between 1995-2010 (3.3% compared to 3.9%), volumes will be clearly higher: 43 million a year as compared to 28 million in the period 1995-2010.

3.1 The rise of emerging economy destinations

International arrivals to emerging economy destinations are expected to grow at 4.4%, doubling the rate of advanced economy ones and bringing immense opportunities for development. From 2015, emerging economies will, for the first time, receive more international tourist arrivals than advanced ones. This trend follows the structural shift in

destination markets observed over the last decades.

In 1980 the vast majority of international arrivals were recorded in the destinations of the advanced, industrialized and diversified economies of North Africa, Europe, and Asia and the Pacific. By 2030 the balance will have shifted in favor of the emerging economy destinations of Asia, Latin America, Central and Eastern Europe, Eastern Mediterranean Europe, the Middle East and Africa

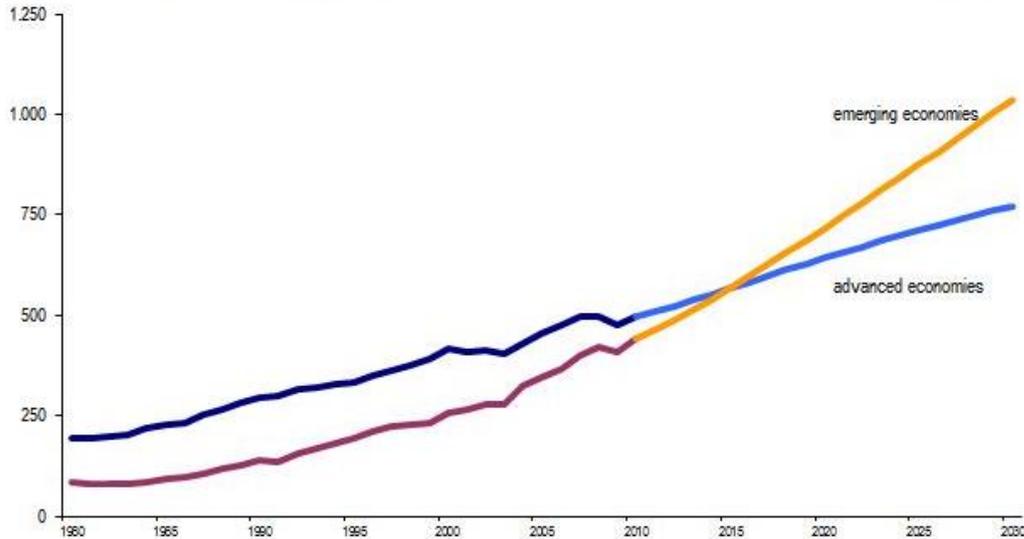
3.2 Shifting market shares

International tourist arrivals to Asia and the Pacific, the Middle East and Africa are all expected to more than double current volumes by 2030. Consequently, the traditional concentration of international tourist arrivals in a relatively few destinations will be further reduced and arrivals will be more evenly spread across the world. Europe and the

Americas will grow comparatively less. Europe, however, will continue to lead in terms of total share as well as in number of

international arrivals received in relation to population size.

Graf. 2 – *Advanced and emerging economies, international tourism arrivals (millions)*



Source: Tourism Towards 2030, World Tourism Organization (UNWTO)

3.3 Tourism trends in 2030

The large majority of arrivals in 2030 will continue to originate from within the same region – 78% of the expected 1.8 billion international tourists. Europe will continue

being the leading outbound market, followed by Asia-Pacific, the Americas, Africa and the Middle East.

In terms of means of transport, forecasts indicate that over half of all international

tourist arrivals will arrive by air as air transport is expected to grow slightly faster than surface transport (road, rail, water) over the coming years, in spite of an expected slight rise in the cost of air travel.

The purpose of visit is not forecast to vary substantially over the next two decades. By 2030, visiting friends and relatives, religion and other purposes will represent 31% of all international arrivals; leisure, recreation and holidays 54%; and business and professional 15%.

4. The road to 1.8 billion tourists in 2030

The growth of international tourism, from a mere 25 million tourists in 1950 to 980 million in 2011, has been spectacular and has brought with it hundreds of millions of jobs, billions of dollars in tourism revenue, roads and basic service in some of the world's poorest and most isolated areas, as well as connecting our world in ways previously unimaginable. It has

allowed countries to diversify their economies, has a significant spillover effect on other sectors and attracts valuable know-how and investment. As such, tourism has become one of the most promising and viable paths for economic growth and development for many countries.

Tourism Towards 2030 shows that there is still significant potential for further growth in the sector over the coming decades, in established as well as new destinations. Provided destinations and companies shape the appropriate strategies, that they follow and adapt to the changes in the marketplace and that governments afford tourism the political support it needs at the highest level and across sectors, tourism will continue to show steady growth and support hundreds of millions of lives worldwide.

Yet, alongside the opportunities emerging from such expansion, come significant

challenges in terms of maximizing tourism's social and economic benefits while minimizing possible negative impacts. As such, it is more important than ever that all tourism development be guided by the principles of sustainable development.

Above all, priority must be given to ensuring that tourism is developed in a way that makes

optimal use of environmental resources, respects the socio-cultural authenticity of host countries, and provides socio-economic benefits to all stakeholders.

USEFUL LINKS:

World Tourism Organization (UNWTO) – www.UNWTO.org

Tourism Towards 2030 – www.publications.unwto.org

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