



UNWTO General Assembly 19th Session

Gyeongju
Republic of Korea
10 October 2011

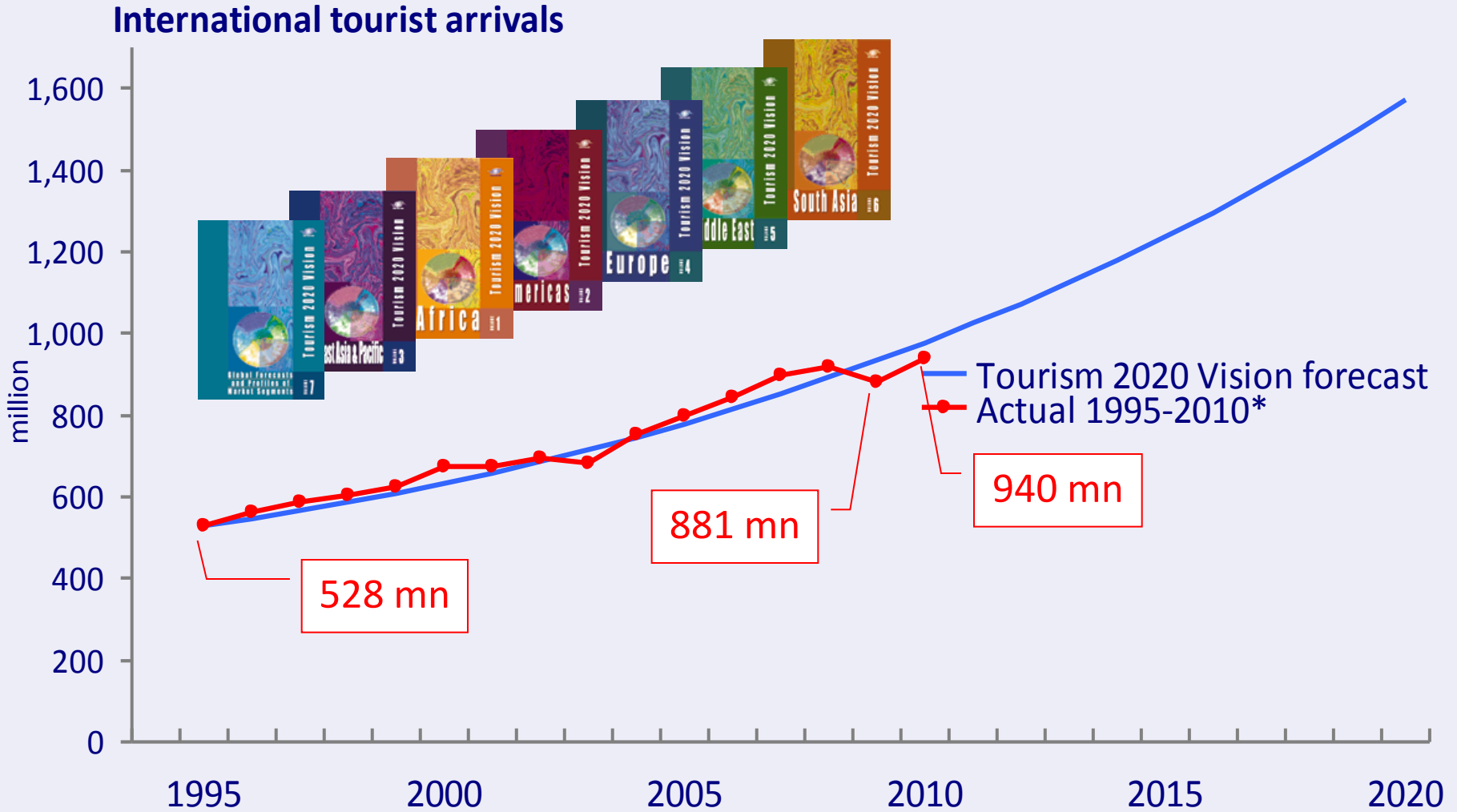


World Tourism Organization

UNWTO

Tourism towards 2030
Global overview

Tourism 2020 Vision vs. actual trend World



Tourism Towards 2030

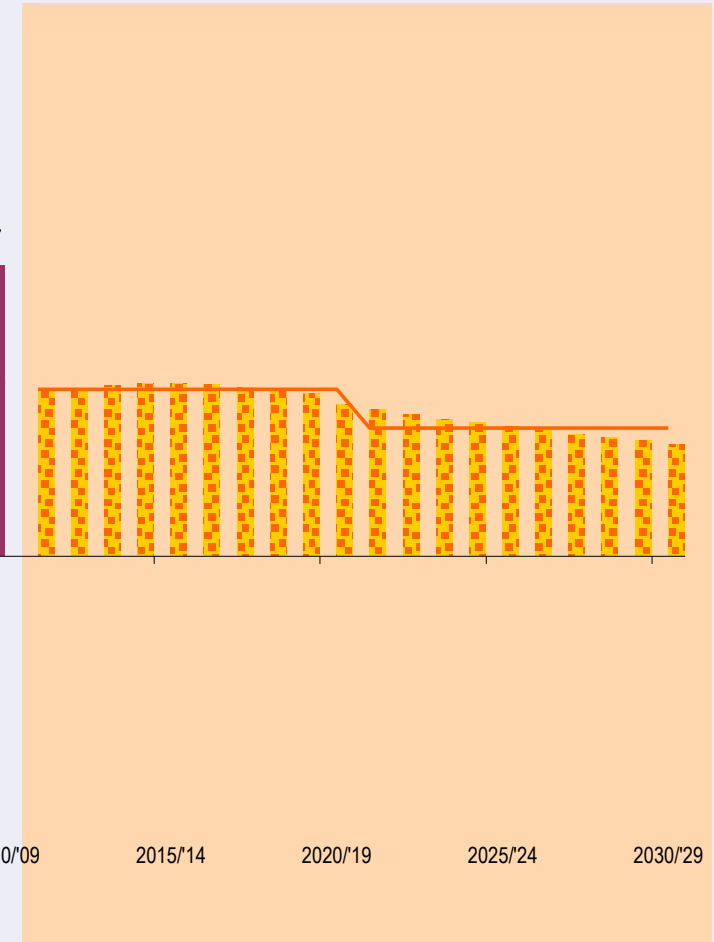
- A broad research project in continuation of UNWTO's work in the area of long-term forecasting initiated in the 1990s.
- Objectives:
 - **Assist** UNWTO Members in formulating policies and long-term strategic plans
 - **Provide** a global reference on tourism future development
 - **Reinforce** UNWTO's role in agenda setting for tourism-related subjects
 - **Constitute** a reference for UNWTO strategic documents, programme of work and activities
- Central in 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 and as independent variables growth of Gross Domestic Product (GDP), a proxy for traveller affluence and business travel potential, and also cost of transport

Growth in international tourism will continue, but at a more moderate pace

International tourism, World



International Tourist Arrivals, % change over previous year



source: World Tourism Organization (UNWTO) ©

International tourist arrivals to increase by 43 million a year on average

International tourism, World

International Tourist Arrivals, absolute change over previous year, million

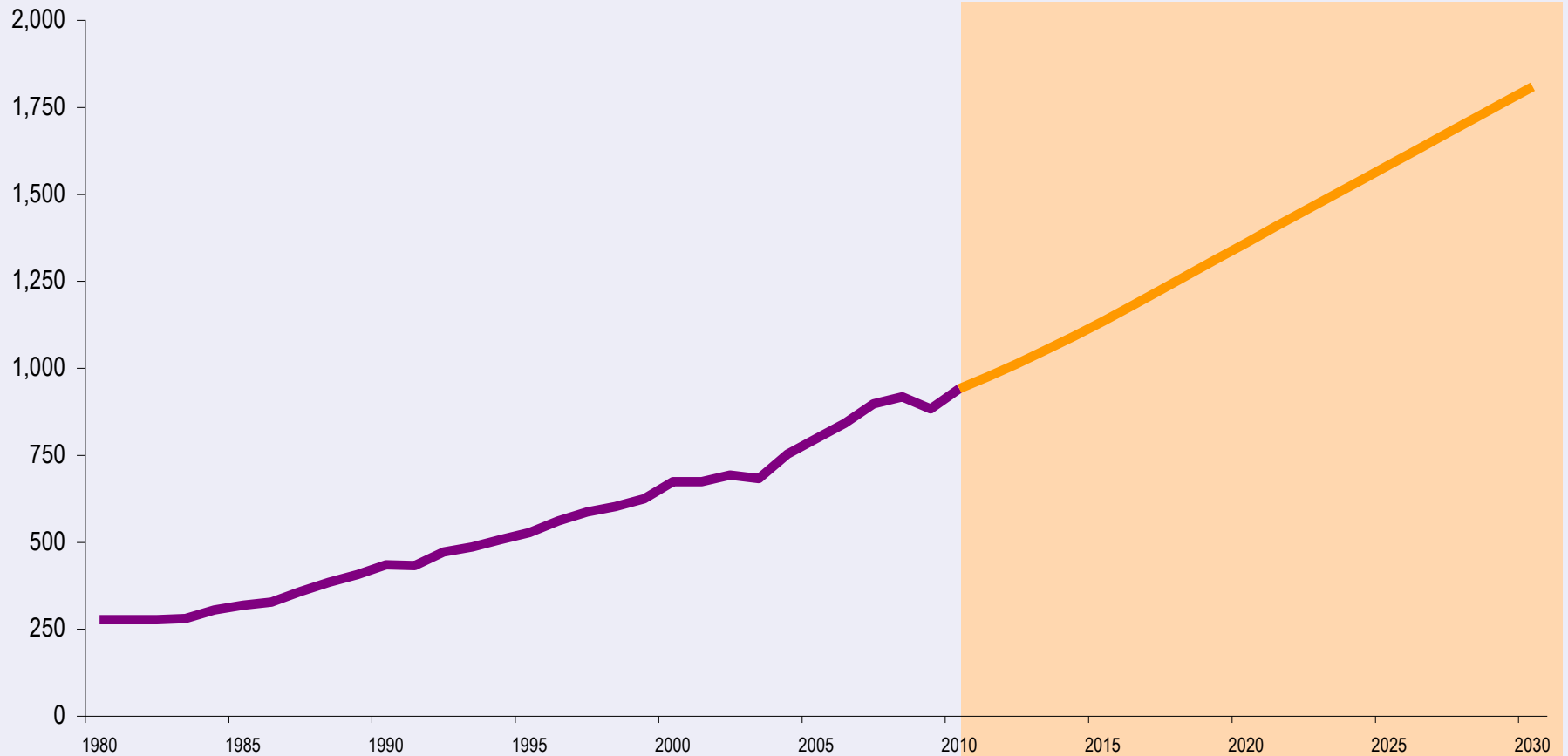


source: World Tourism Organization (UNWTO) ©

International tourist arrivals to reach 1.8 billion by 2030

International tourism, World

International Tourist Arrivals, million

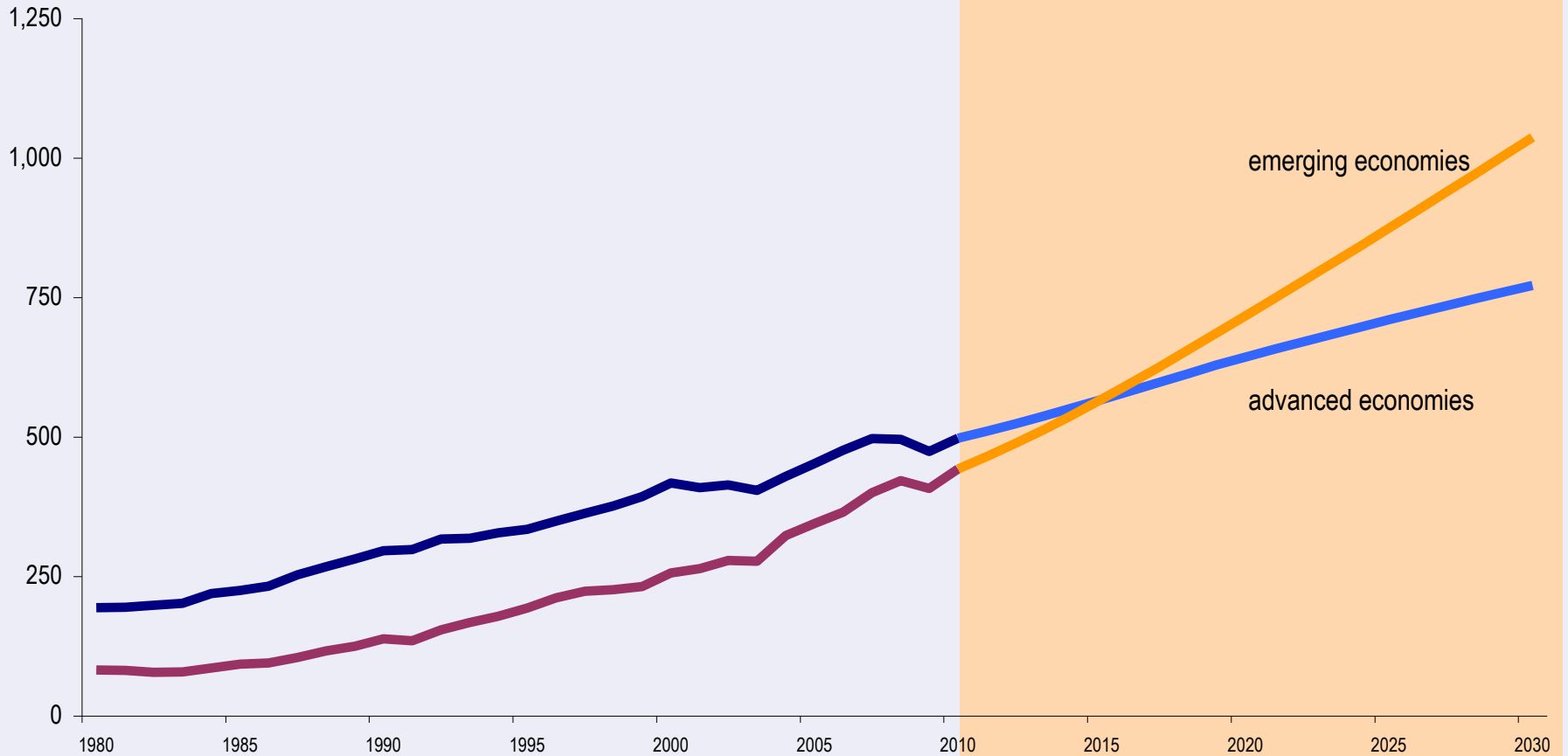


source: World Tourism Organization (UNWTO) ©

Emerging economy destinations to surpass advanced destinations in 2015

Inbound tourism, advanced and emerging economies

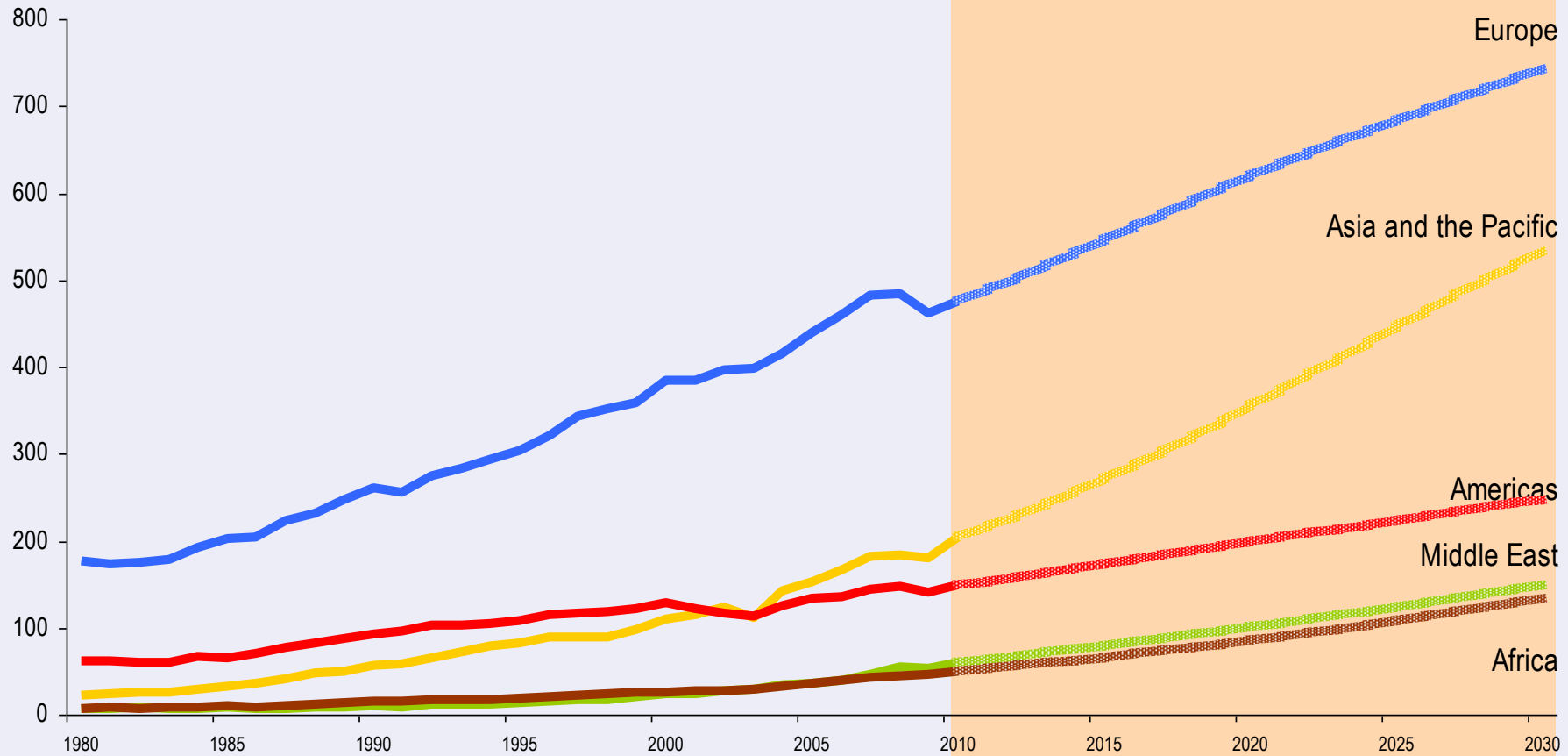
International Tourist Arrivals, million



source: World Tourism Organization (UNWTO) ©

Asia and the Pacific will gain most of the new arrivals

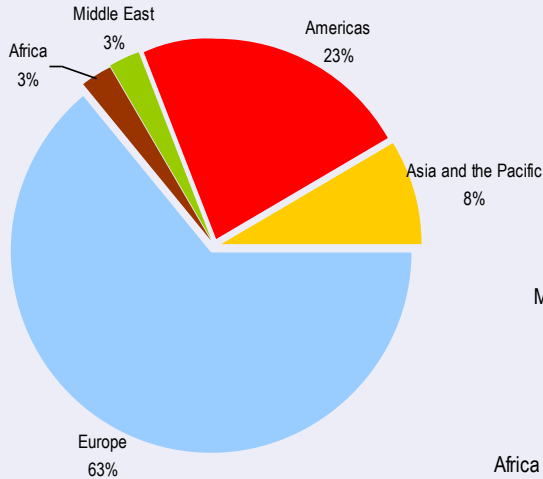
Inbound tourism by region of destination



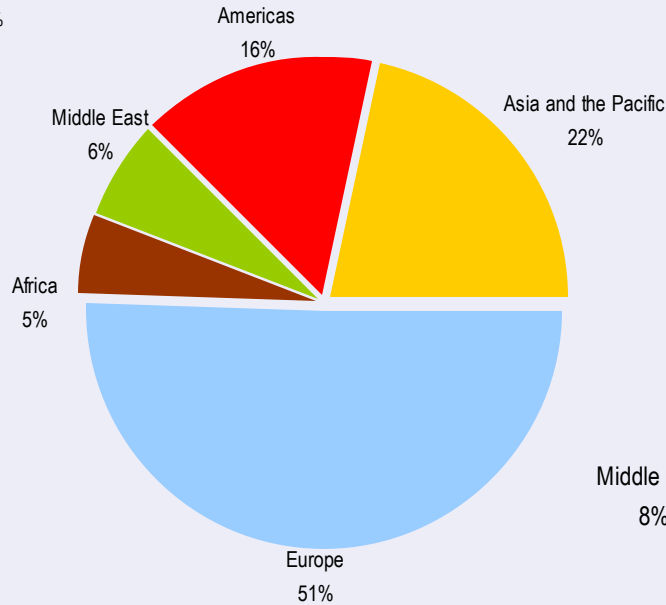
source: World Tourism Organization (UNWTO) ©

Asia and the Pacific, the Middle East and Africa to increase their shares

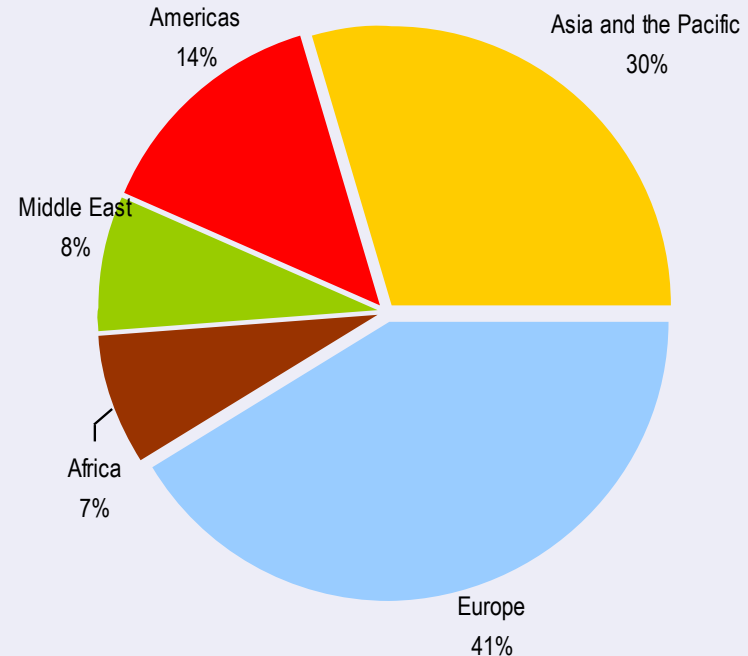
1980



2010



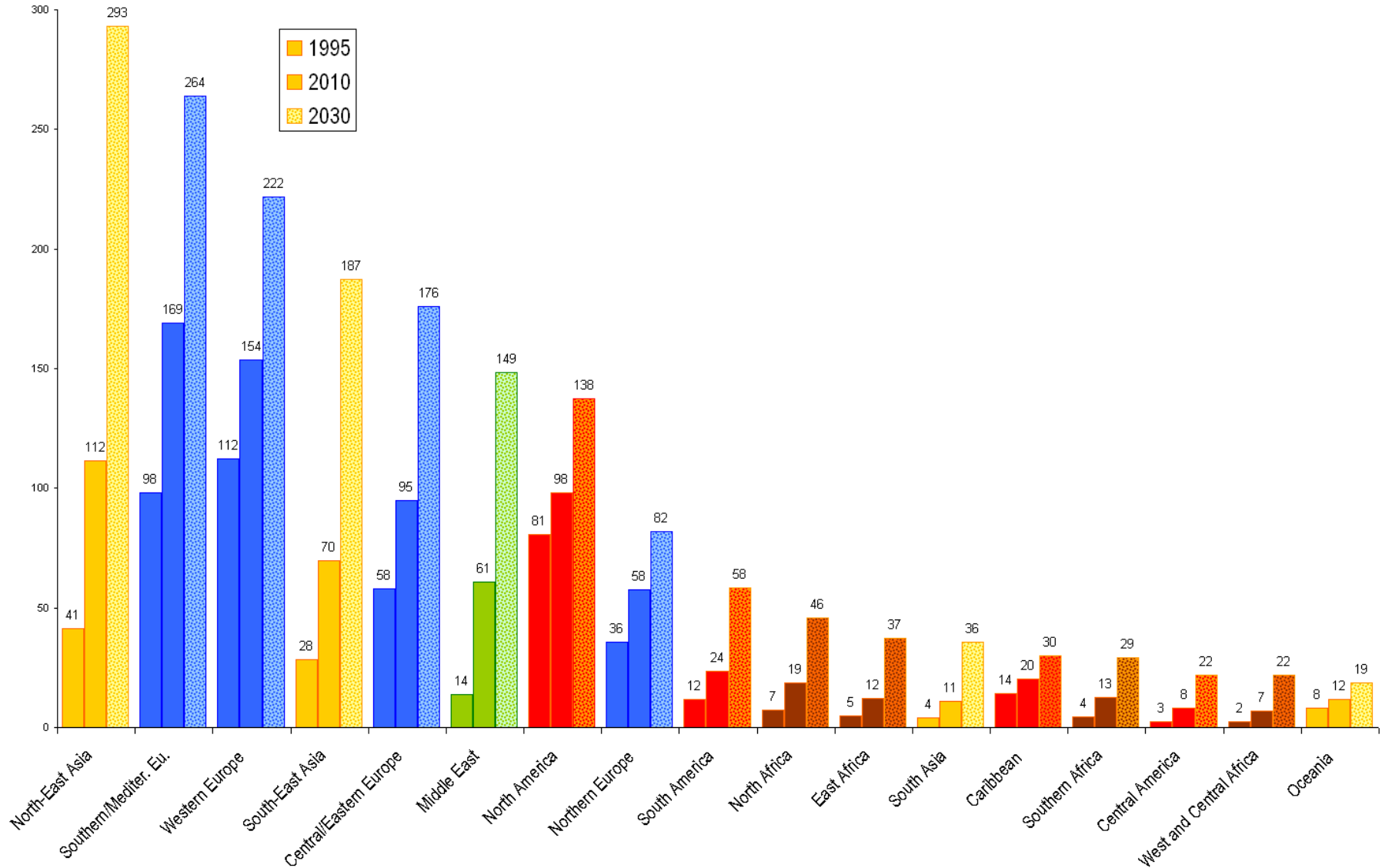
2030



North-East Asia will be the most visited subregion in 2030

International tourism by (sub)region of destination

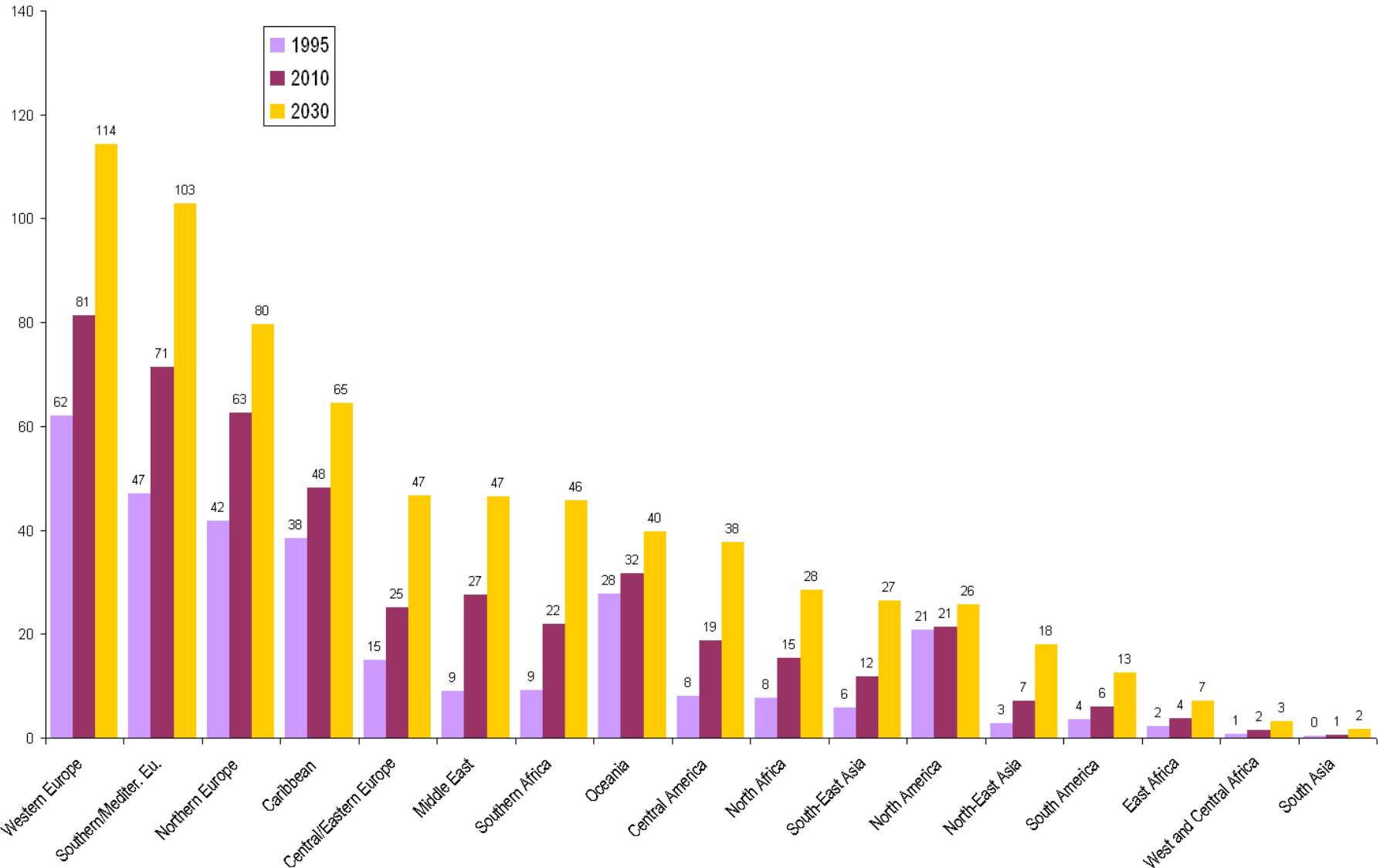
International tourist arrivals, million



Europe continues to lead in international arrivals received per 100 of population

International tourism by (sub)region of destination

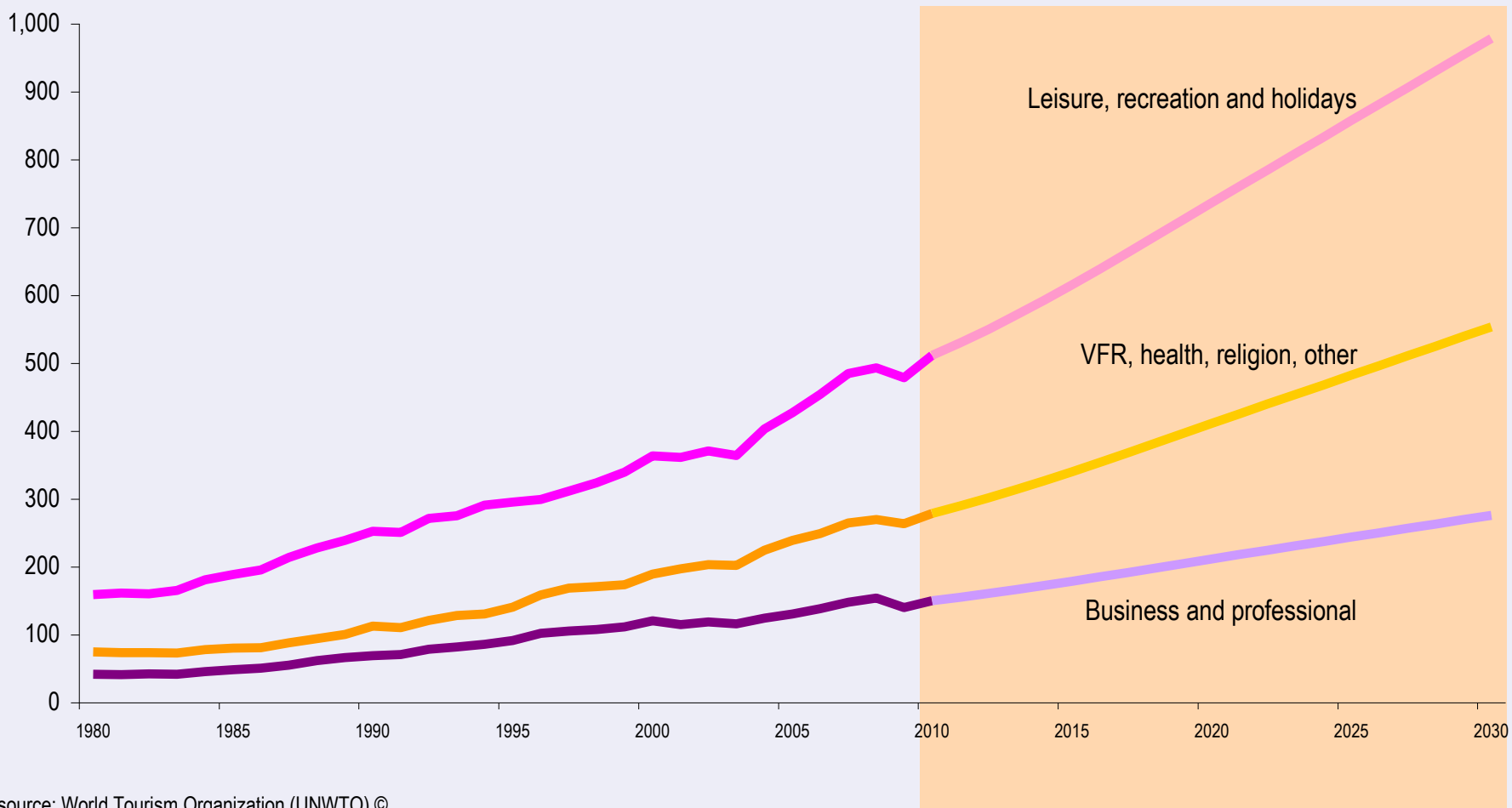
International tourist arrivals received per 100 of population



No major change in share by purpose of visit

International tourism by purpose of visit

International Tourist Arrivals, million

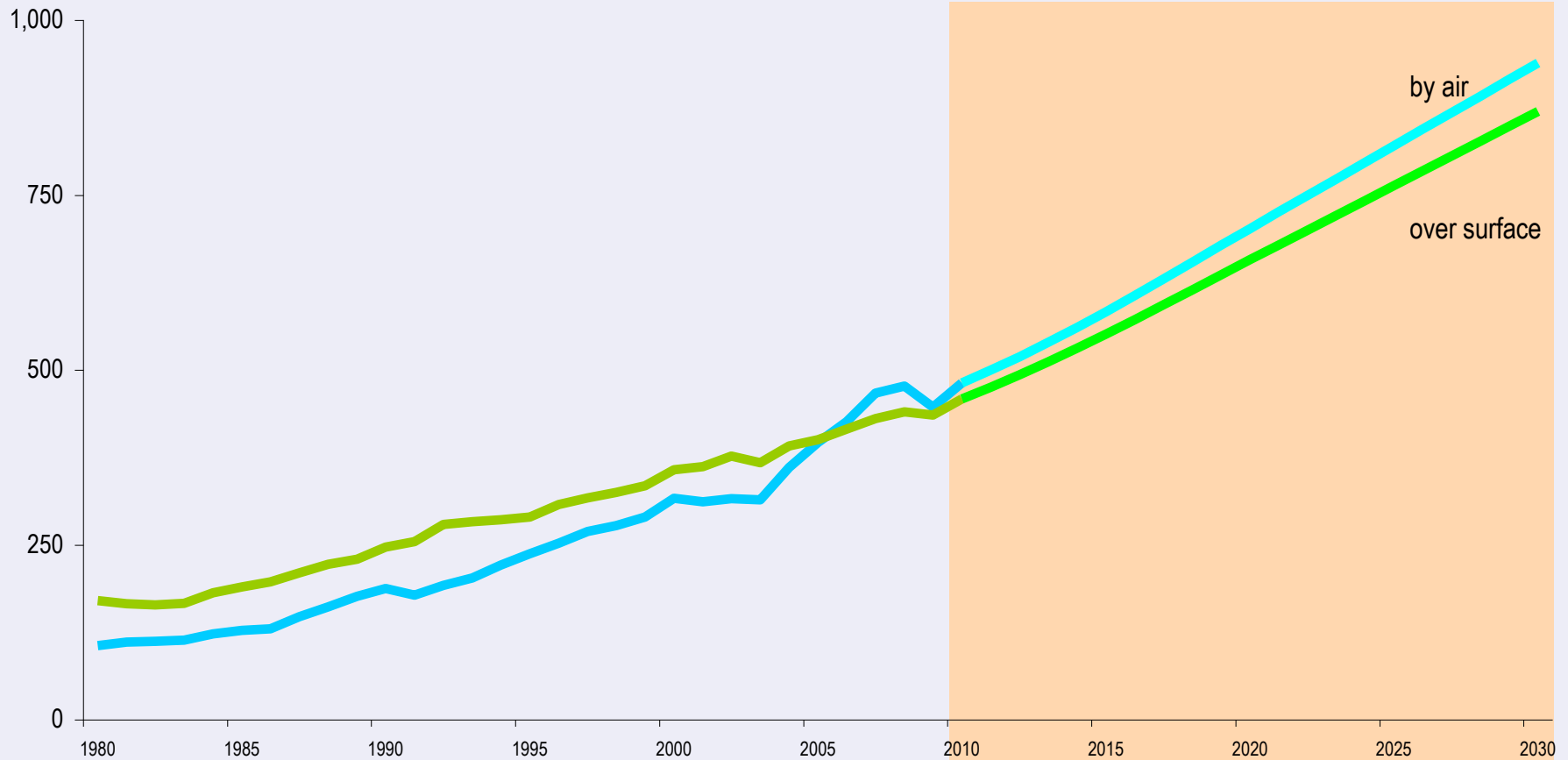


source: World Tourism Organization (UNWTO) ©

Air transport will continue to increase market share, but at a slower pace

International tourism by means of transport

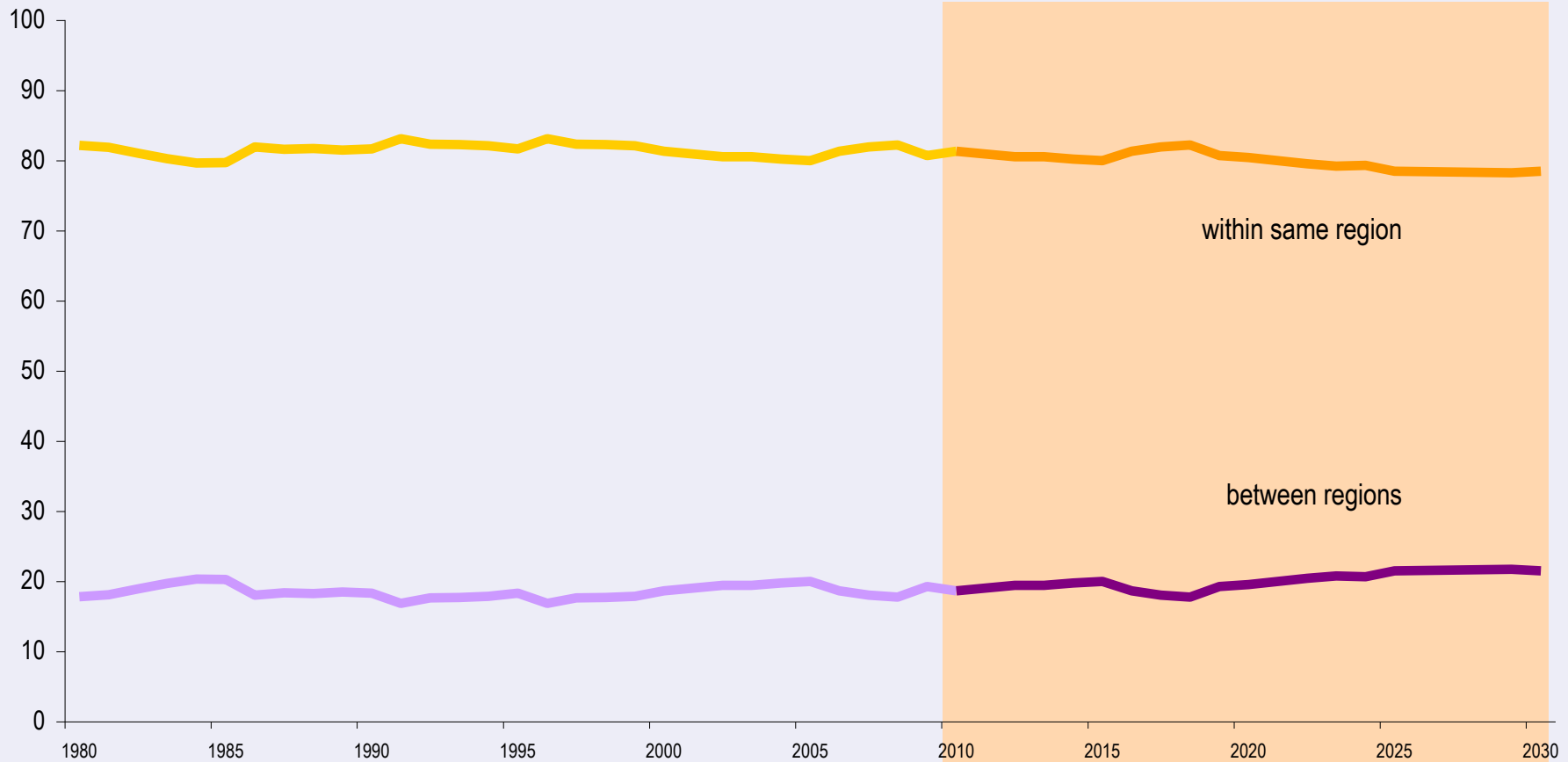
International Tourist Arrivals, million



source: World Tourism Organization (UNWTO) ©

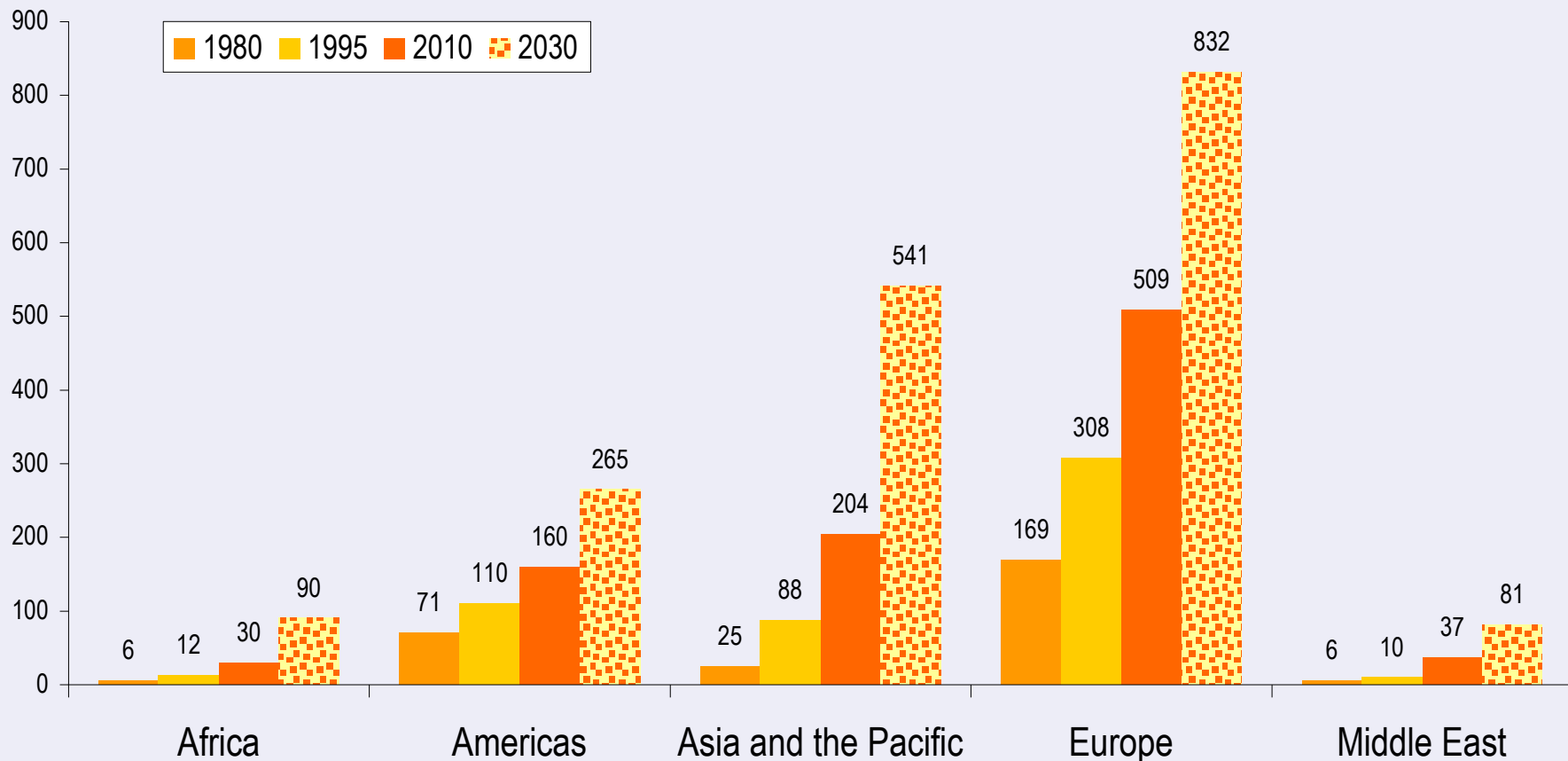
Travel between regions continues to grow slightly faster than within the same region

International tourism by region of destination and origin



Asia and the Pacific will also be the outbound region that grows most

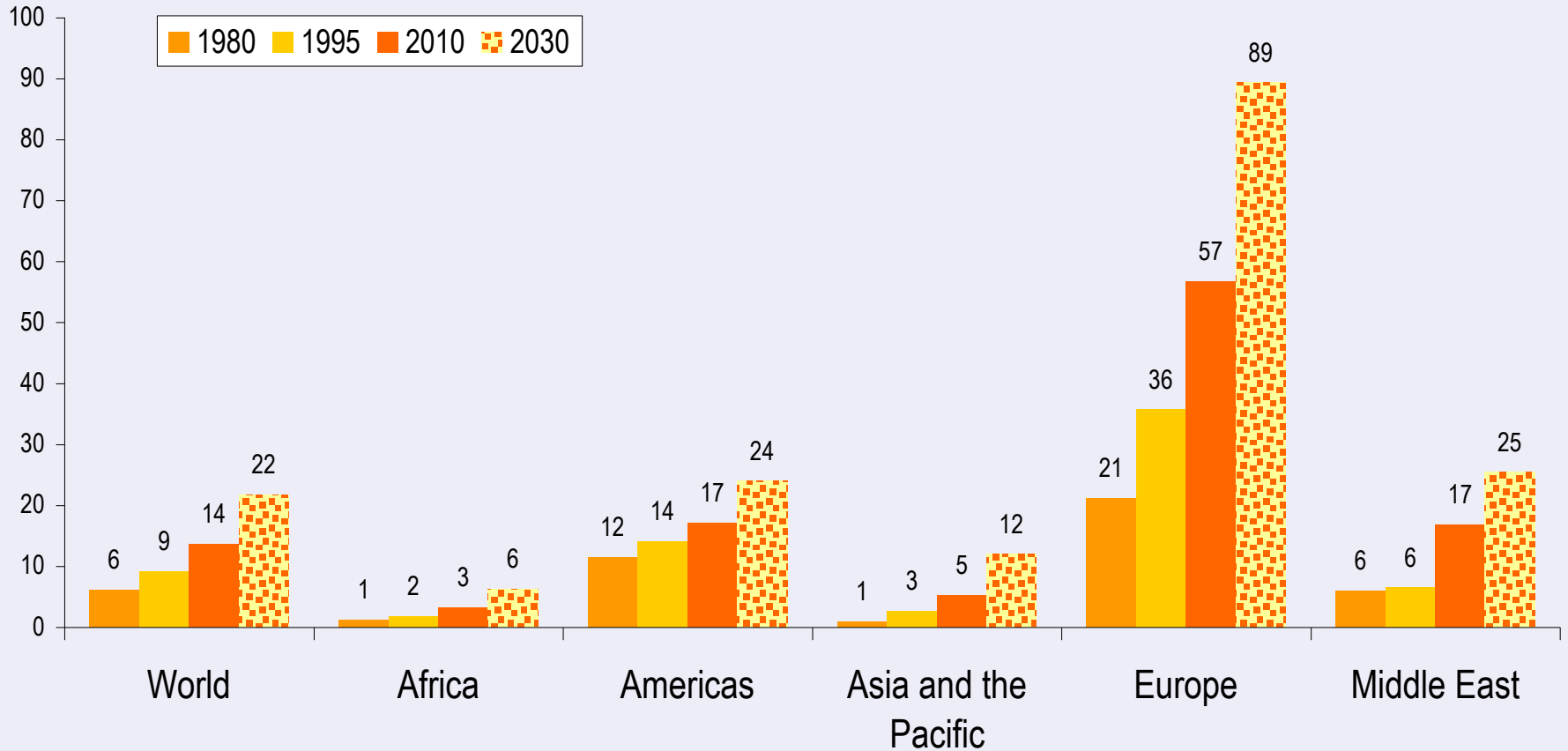
Outbound tourism by region of origin



Outbound tourism participation is highest in Europe and still low in Asia and the Pacific

Outbound tourism by region of origin

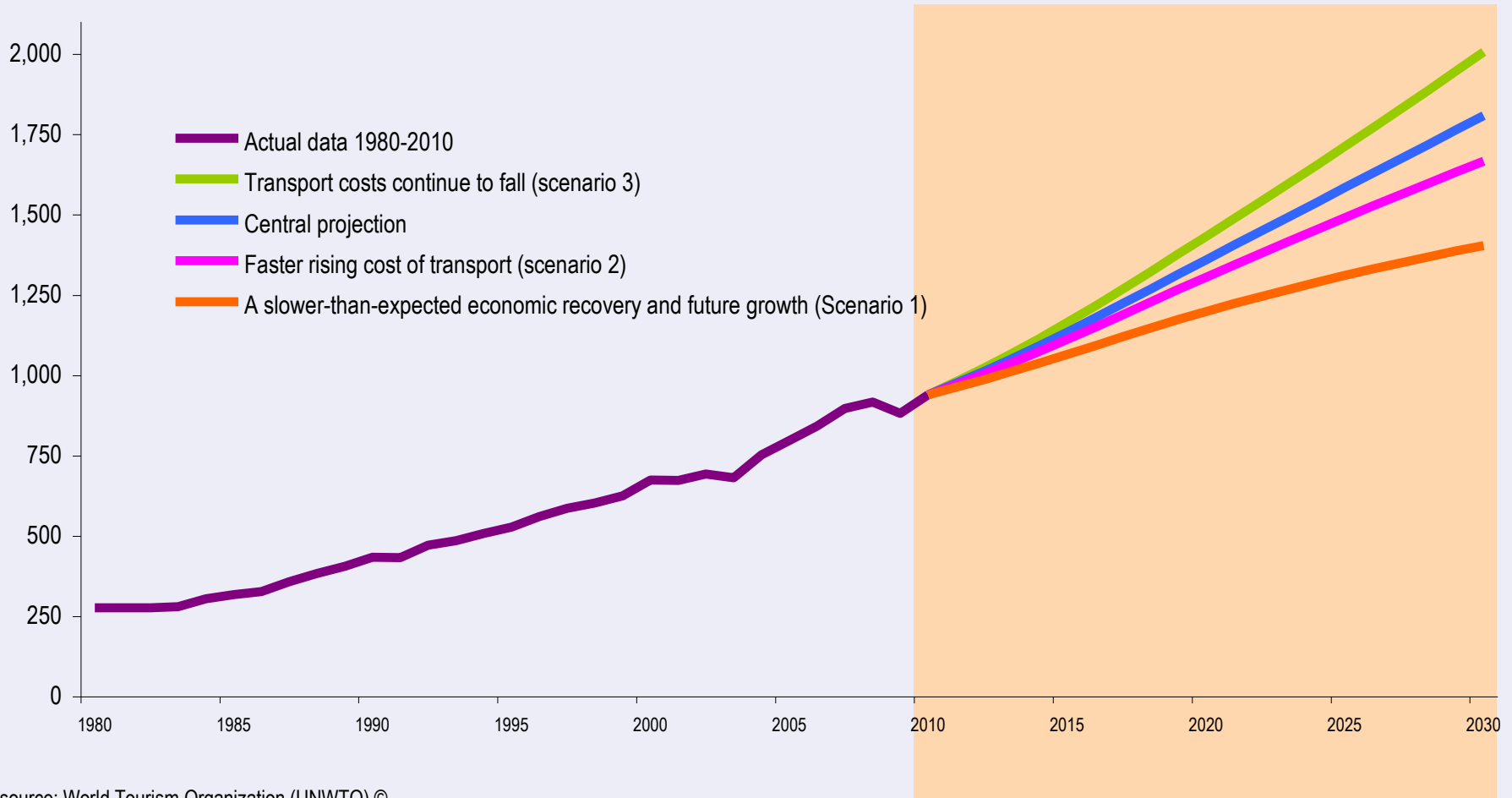
International Tourist Arrivals generated per 100 population



What if assumptions change?

Tourism Towards 2030: global projection and sensitivity analysis

International Tourist Arrivals, million



source: World Tourism Organization (UNWTO) ©

One-Page Tourism Towards 2030

- 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 substantial potential for further expansion in coming decades. Established as well as new destinations can benefit from this trend and opportunity, provided they do 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



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Tourism towards 2030
Global overview



**Thank you very much
for your attention!**

World Tourism Organization (UNWTO)

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