

Emerging trends in global tourist arrivals: Challenges and implications for developing countries

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Abstract: Tourism has witnessed a faster growth (in arrivals) across the globe during last two decades. The market share of developing countries, in tourist arrivals, has increased from 30% in 1980 to 47% in 2012 and is estimated to reach 57% by the year 2030. Tourism has an enormous potential to help promote the economic prosperity in developing countries by creating jobs, generating income and diversifying economy, particularly in countries which lack viable alternative means of development. It can also produce impacts that are potentially threatening to the local environment and socio-cultural settings, unless properly planned and carefully developed. Though growing tourist arrivals in developing countries are positive indicators for their economic prosperity, the sustainability (environmental and socio-cultural) would always be a daunting challenge. In this perspective the present descriptive study is aiming at analyzing the latest trends in global tourist arrivals and providing an insight into the reasons that have led to the phenomenal growth in tourist arrivals to the developing countries. The implication of such rapid growth and the challenges faced by developing countries are highlighted. In the context, certain measures to maximize the sustainability of tourism destinations in developing countries are suggested.

Key words: tourist arrivals, developing countries, trends, challenges, sustainability.

1. INTRODUCTION:

Tourism has a long history, in fact the desire of travel within man was there ever since his evolution. However the tourism, as we see it today, is a concept of very recent origin. It developed through various stages – from nomad travel to the travel for exploration; to travel in search of knowledge and pilgrimage; to mass tourism and holiday making; and finally to the present concepts of eco-tourism, green tourism, sustainable tourism etc. It has today evolved as an industry in its own right and has earned the status of being largest export industry in the world. In many countries it has become the largest foreign exchange earning activity and highest contributor to their GDP, pushing behind the traditional activities of agriculture and manufacturing industry.

The globalization and liberalization of tourism has further benefited the tourism industry to a significant extent. This has happened, more so in the developing countries which have no other significant export commodity base. Tourism a few decades before was thought to be the activity of only affluent few, and the most of the travel for tourism purposes was within and between the developed worlds. The introduction of jet travel in the middle of the 20th century, the revolution in mass communication and information, and the high technological advancements changed the dimensions of tourism.

Realizing the importance of tourism as a potential foreign exchange earner, employment generator, promoter of peace and international understanding and its capacity to promote local and regional development; the developing countries welcomed international tourism as a part of their national economic policies. Today tourism in developing world is growing at much faster rate than the developed world. According to the United Nations World Tourism Organization (UNWTO), the market share of emerging economies increased from 30% in 1980 to 47% in 2012 and is estimated to reach 57% by the year 2030 (UNWTO, 2013a).

Tourism has a potential to help promote prosperity and has assisted many developing countries to move away from a dependency on agriculture and manufacturing (Tooman, 1997), at the same time it can also cause a great deal of harm unless carefully developed. Pleumarom (1999) argues that more than two-thirds of the revenue from international tourism never reaches the local economy because of high foreign exchange leakage and this together with social cultural and environmental costs nullifies its benefits altogether. Thus it cannot be denied that tourism if not developed in a planned manner can lead to the destruction of the very resources it thrives upon. It is in this context that this paper

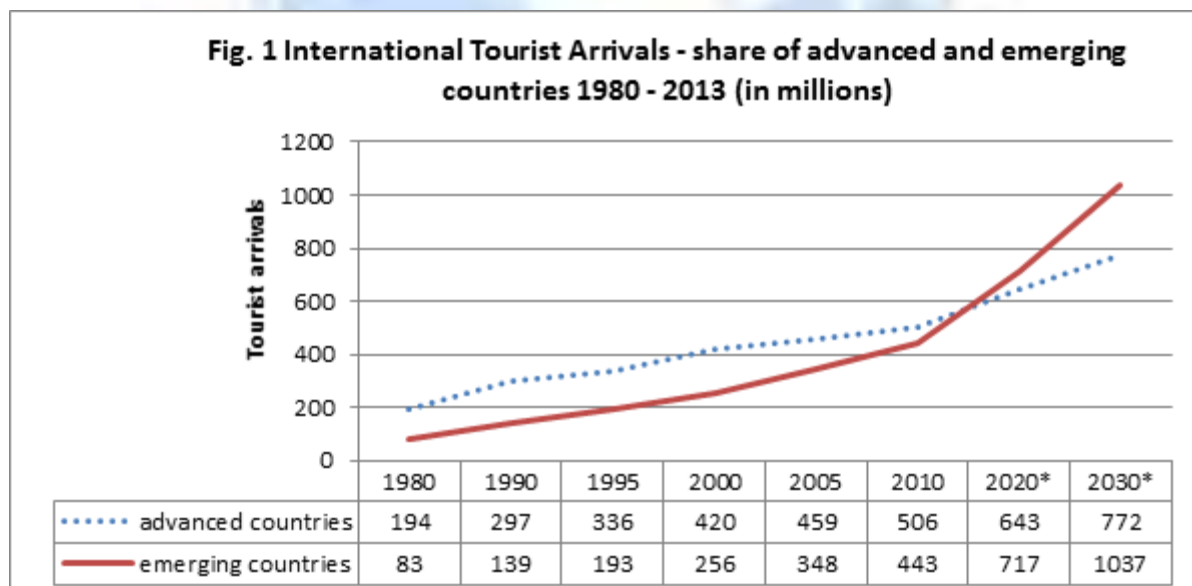
intends to analyze the tourism in the developing world, emerging trends in its direction of flow, and its impacts on the social, cultural, environmental and economic fronts of the developing countries.

2. Emerging trends in global tourist flows

Over the past six decades, tourism has experienced continued expansion and diversification, becoming one of the largest and fastest-growing economic sectors in the world. The international tourist arrivals are estimated to reach 1.6 billion in 2020 from 983 million in 2011. During the same time the international tourist spendings will cross US\$ 2 trillion a year from US\$ 1,030 billion in 2012 making it the world's leading industry. These projections are based on the annual growth rates of 4.3 % for arrivals and 6.7 % for spendings, which is well above the maximum expected expansion of 3% per year in world GDP. Already in 2011, tourism exports accounted for as much as 30% of the world's exports of commercial services and 6% of overall exports of goods and services (compiled from data available in UNWTO 2012a, 2012b, 2013a). UNWTO in another of its documents, titled Tourism Towards 2030 Global Overview (UNWTO,2013b), to assess future trends in tourism, has estimated the number of international tourist arrivals worldwide to increase on an average by 3.3% a year from 2010 to 2030. This represents some 43 million more international tourist arrivals every year, reaching a total of 1.8 billion arrivals by the year 2030 (UNWTO, 2012b).

While international tourism has grown at appreciable rate, it has witnessed a sharp shift in the share of tourist arrivals between developing (emerging) and the developed (advanced) countries. In the past two decades the emerging economy destinations have grown faster than advanced economy destinations, and this trend is set to continue in the future also (UNWTO, 2012a). One of the first indications of such a dramatic shift could be seen in the UNWTO Annual Report of 1996, which stated that tourism in developing countries is on the increase, with growth rates exceeding those of developed countries, as tourism receipts in developing countries increased from 3.0% to 12.5%, between 1980 and 1992. At that point in time, even when developed countries dominated the main world share of tourist receipts at 60%, both arrivals and receipts were decreasing particularly in Europe. As can be seen in the fig. 1, the UNWTO has estimated the tourist arrivals to emerging countries to surpass those of advanced countries by the year 2015 and the trend is estimated to continue in the future.

According to UNWTO (2012b) Europe's share of international tourist arrivals has dropped from 63% in 1980 to 51 % in 2010 and will decline to 41% in 2030; America's share of arrivals in the same period has dropped from 23% in 1980 to 16 % in 2010 and is estimated to further decline to 14% in 2030. On the other hand the sharpest rise has been recorded in Asia-Pacific region from 8 % in 1980 to 22 % in 2010 and is estimated to rise to 30% by 2030.



(*) indicates estimated figures

Source: compiled from UNWTO Tourism Towards 2030, Global Overview (2013)

Africa's share increased from 3% in 1980 to 5% in 2010 and is expected to rise to 7% in 2030. The same trend is witnessed in the Middle Eastern region with its share in global tourist arrivals rising from 3% in 1980 to 6% in 2010 and to 8% in 2030. These trends are quite evident that the future tourism belongs to the developing countries. The Figures 1.1, 1.2, 1.3 & 1.4 below shows the percentage share in international tourist arrivals by region of destination for 1980, 2010, 2020* & 2030* (*estimated) respectively.

Fig 1.1 Inbound tourism by region of destination
International Tourist Arrivals in 1980, share, %

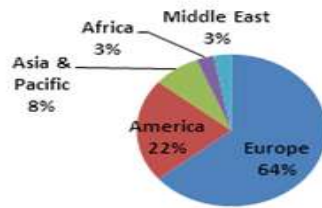


Fig. 1.2 Inbound tourism by region of destination
International Tourist Arrivals in 2010, share, %

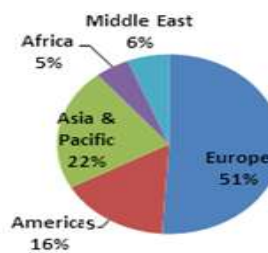
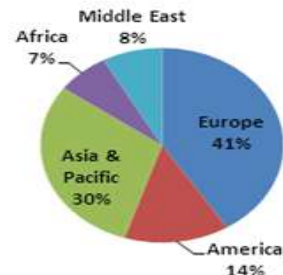


Fig. 1.3 Inbound tourism by region of destination
International Tourist Arrivals in 2020, share, %



Fig. 1.4 Inbound tourism by region of destination
International Tourist Arrivals in 2030, share, %



Source: World Tourism Organization (UNWTO), Tourism towards 2030 Global Overview (2013)

The above figures by UNWTO indicate that the Asia & Pacific region will overtake the Americas as the second most popular destination region, holding a 27% market share in 2020 against 15% by Americas and by the year 2030 this gap will further widen with Asia & Pacific having a share of 30% against 14% by Americas. With this significant growth rate as estimated by the UNWTO, the tourism industry will be doing its best to promote destinations in emerging regions of the Asia & Pacific, Africa and the Middle East. These trends in the international tourist arrivals and growth are indicative of a sharp shift from developed to the developing world.

3. Factors that lead to growth of tourism in developing countries

The numerous economic attributes of tourism, most important being generation of employment and earning of foreign exchange, has made it an attractive choice for many developing countries. Thirlwall (1979) argues that 'tourism's appeal to developing countries is based, in large part, on its provision of foreign currency earnings and corresponding alleviation of the balance of payments constraint. Tourism has also become the most important earner of the foreign currency in many developing countries. For those who have no other competitive commodity base it has become the only export, the mono-crop (Tourism Concern, 1996). For example, Asian countries such as Thailand, Malaysia and Indonesia are renowned for their high level of tourism receipts and many other countries (Asian and African) are highly dependent on tourism activities.

Apart from pure economic attributes that made tourism an attractive choice for developing countries, there have been many developments in and outside these countries that directly or indirectly favored developing countries in their stride to develop tourism. UNWTO in the years 1992, in one of its studies 'tourism trends to the year 2000 and beyond' highlighted two important sets of factors that were likely to shape tourism in the 21st century. These were a) exogenous factors (demographic and social trends; economic and financial issues; political, legislative and regulatory trends; technology; transport; trade; and safety), and b) market forces (demand and supply; emerging trends, distribution of tourism and travel products and services).

Poon (1993) in her study viewed diffusion of information technology in tourism industry, deregulation of airline industry, environmental pressures, competition and changing tourist preferences, as factors leading to this drift as we are witnessing at present. Cleverdon & Kalish (2000) viewed saturation of short-haul destinations in the Mediterranean, availability of cheap long-haul package tours to destinations in tropical which attract Western Europeans, exotic locations in the east those are frequently marketed by the industry in the North as paradise and also the becoming of Africa, Asia and the Pacific as fashionable, affordable, and easily accessible for the average middle-income European citizens; as reasons for this changing pattern of global tourist flows.

The UNWTO in 2002 listed the major determinants and influences affecting tourism to 2020 (which favor developing countries) under eleven headings as Economy, Technology, Facilitation, Safety, Demography, Globalization, Localization, Social-environmental awareness, Living and working environments, Experience economy and Marketing.

The Asian financial crisis of 1990s led International Monetary Fund (IMF) to classify tourism as an export strategy for debt-ridden underdeveloped and developing countries. World Tourism and Travel Council (WTTC) in 1998, also acknowledged a decline in tourism activities due to the Asian financial crises and recommended that governments give continued priority to tourism to assist Asian economic recovery and develop tourism as an export strategy (WTTC, 1998).

The developing countries, being cash starved, viewed tourism as a short cut to rapid development. Gonsalves, P. (1995) argues that the inclusion of tourism as the part of Structural Adjustment Programs (SAPs) by the IMF to overcome the Asian financial crises of 1990s lead the developing countries to globalize their tourism industry, since for the approval of financial assistance, the indebted country was required to deregulate and liberalize its economy and become integrated with the global economy, hence linked the Third World countries with the global economy.

The other important agreements that had direct bearing on tourism and led the developing countries, willingly or unwillingly, accept tourism as an export strategy; were the General Agreement on Trade in Services (GATS), Agreement of Trade-related Investment Measures (TRIMs) and Multilateral Agreement on Investment (MAI). These agreements paved way to gradual elimination of barriers to international trade in services, fettered similar rights to MNCs as those of local companies leading them to invest their capital in developing countries, and several provisions that exempted the foreign companies from utilizing the local input (Madeley, J. 1995).

Lately the GATS 2000 negotiations, mandated by the Final Act of the Uruguay Round, provided developing countries with a unique opportunity to counterbalance the asymmetries imbedded in the outcome of the Uruguay Round services negotiations (Diaz, D. 2001). Globalization and economic liberalization are the other major factors that have led to increased tourist flows to developing countries. As a result of globalization the entry of international hotel chains, international tour operators, and international airlines; into developing countries played a significant role in promoting international tourist traffic to these countries.

4. Implications and challenges

The global trends in international tourism discussed in the earlier paragraphs clearly indicate a sharp shift of international tourist arrivals towards developing countries. However the developing countries have been recklessly promoting tourism in their dire need of deriving economic benefits. This has led to produce tourism impacts not always sympathetic but instead potentially threatening to their local settings. More serious problems have been witnessed in the regions which do not have appropriate means for protecting their natural resources and local ecosystems. This reckless and uncontrolled expansion of tourism, in absence of proper protective systems, is likely to lead to economic, socio-cultural and environmental problems. The following sections give a review of the implications and challenges faced by developing countries.

4.1 Economic challenges

Most of the studies that have been supportive of tourism see tourism purely in economic terms (Elkan, 1975; Balaguer, 2002; Dritsakis, 2004; Kim, 2006; Shan, 2001; Lanza, 2003; Durberry, 2002). These and other such studies have mainly focused on economic indicators such as foreign exchange earnings, multiplier effect, employment generation etc. Roe, et. al. (2004) argue that tourism opens up significant export opportunities for developing countries, as it brings the consumer to the product. Nevertheless such studies at times tend to camouflage the ill effects that the rapid growth of tourism has brought about in many tourism destinations. As Wall & Mathieson (2006), after investigating into the studies by multiple authors, concluded that there is no linear relationship between the growth of tourism and the economic benefits to the destination. Many other critics of tourism are of the opinion that tourism only leaves minimal economic benefits in host countries due to high levels of profit leakage, particularly with forms of mass tourism, (Mitchell & Ashley, 2007; Lacher & Nepal, 2010) and a great proportion of benefits derived from tourism leaks to foreign countries (Page & Connel, 2006; Sandbrook, 2010).

The World Tourism Organization in its report on Sustainable Development of Tourism in 2002, stated that the developing countries have most urgent need for income, employment and general rise of standard of living by means of tourism, but at the same time they face an even bigger challenge of having least ability to realize these benefits owing to the large-scale transfer of tourism revenues out of the host country. According to United Nations Conference on Trade and Development (UNCTAD) as cited by UNEP, the average import-related leakage for most developing countries today is between 40% and 50% of gross tourism earnings for small economies and between 10% and 20% for most advanced and diversified economies. Other economic challenges frequently cited in literature are high cost of tourism infrastructure development, price rise, economic dependence of local community on tourism, and above all the seasonal characteristics of tourism employment.

4.2 Socio-cultural challenges:

Tourism is widely acknowledged as a significant contributor to social and cultural changes at host destinations. On the positive side tourism has an inherent capacity to promote social development through its significant impact on employment creation, income and poverty alleviation, and physical and social infrastructure development etc. (Lankford, 1994; McCool and Martin, 1994; Ross, 1992). These characteristics of tourism not only make it attractive for developing countries but also make it an irresistible necessity. At the same time the presence of tourists and their interactions with the socially and culturally distinct host community often leads to various negative socio-cultural influences such as demonstration effect, acculturation, commercialization, drug abuses, child labour, prostitution, overcrowding, changes in religious observances, dress, behavioral norms and traditions etc. (Ap and Crompton, 1993; Johnson, et al. 1994).

Edgell D. (1993) writes that 'all too frequently there are complaints that tourism generates pollution, crowding, crime, prostitution and the corruption of the language, culture and customs of some local populations'. The socio-cultural challenges associated with tourism have lately received much wider scholarly attention. The critics of international tourism, in developing countries, argue that it leads to various negative societal impacts on local communities by way of threatening and destroying locals' traditional livelihood, and local self-reliance. It is also widely argued that the jobs created by tourism industry are less secure with less benefits, are not adequate living-wage, and usually in unorganized sectors not complying with labor standards.

4.3 Environmental challenges:

The natural environment forms an important component of any destination. Yet at the same time the unplanned tourism activities could lead to the destruction of very resources it thrives upon. A number of instances are cited in literature which show the attitude of tourists has not been in conformity with the environmental needs of the host destinations, particularly in developing countries where the destinations are frequented by affluent tourists from the developed world.

Cleverdon, R. & Kalish, A. (2000) while referring to reports those indicate that the beaches in Thailand, Goa, North Africa are under a considerable environmental threat have been critical of the mentality of these affluent tourists those lay emphasis on cheap prices rather than quality, threatening the environmental fabric of the much sought after destinations in many developing countries. Today many developing countries are facing serious over-exploitation of their natural resources as a result of excessive tourist inflows. Hunter & Green (1995) opines that 'due to the pressure exerted on the environment by tourism, some destination areas may ultimately become unsustainable and decline in popularity over the long term.

To stop tourism's serious over-exploitation of nature and thereby prevent its destruction of exactly what it is based on, the relationship between tourism and environment needs to be balanced by introducing the sustainability paradigm to tourism (Clare A Gunn, 1994; Lui, Sheldon & Var 1987; Wheatcroft, et al., 1991). Robinson, M. and Boniface, P. (1999) writes that 'conflicts over exploitation, over usage and contested use of environment for touristic purposes have over recent years attracted great deal of attention and have paralleled wider public and political environmental debate.

Lately these concerns about the environmental issues of tourist destinations has led to the development alternative tourism concepts such as sustainable tourism, eco-tourism, green tourism and the like. However the real challenges faced by the developing countries in promoting sustainable tourism development lies in the fact that, on the one hand, they are witnessing increased tourist inflows and, on the other hand, they face resource scarcity to meet sustainability issues associated with such tourist inflows.

5. Addressing the Challenges:

In order to achieve tourism's full potential viz. a viz. to sustain it, it is necessary for the developing countries to address various issues and challenges arising from tourism in a systematic and comprehensive manner. The tourism development should be balanced with broader economic, social and environmental objectives. Issues of policy making, planning, management, public-private partnerships and contributions, stakeholder involvement and above all the community involvement in tourism development need to be addressed to overcome possible constraints through concerted efforts. Several challenges those need to be addressed are as follows:

5.1 Income leakages

Leakage is the amount of tourist expenditure that remains within the local area after the profits and wages are paid outside the area and after imports are purchased. Developing countries are heavily dependent on foreign labor, import of goods and services to meet the requirements of the tourists at the destination. Also these destinations are frequented by international hotel chains and foreign tour operators, and much of their income generated through tourism flows out of the local economy. For example, in Thailand 70% of all money spent by tourists end up leaving Thailand (via

foreign-owned tour operators, airlines, hotels, imported drinks and food, etc.). Estimates for other Third World countries range from 80% in the Caribbean to 40% in India (as quoted by UNEP). Developing countries must try limiting leakages if they are to maximize their revenues from tourism. This can be done through promoting homegrown tourism through local or traditional tourist facilities, involving local people and communities in providing tourist services. This will allow much of the revenues to remain in the domestic economy rather than seep across borders.

5.2 Laws and legal regulation

One of the significant challenges that the developing countries face is the absence or lack of robust legal and regulatory framework concerning tourism. The laws must ensure that local communities are benefited, not exploited; environment is safeguarded, not overdeveloped; local cultures and the rights of ethnic and religious groups are protected, not sacrificed; and the land, property and livelihood of communities are protected, not snatched. This requires a coherent legal framework coupled with a sound institutional setup at national and local levels.

5.3 Political will

Governments at national levels are normally the instigators of tourism policy, planning and development. A constructive and tourism-supportive leadership at national level is a pre-condition to direct tourism into a thriving sector of economy. Unfortunately tourism industry has been either neglected or overlooked by developing countries while framing their national development policies. This neglect or oversight of tourism industry has been primarily due to the biased attitude of political class towards tourism. Since the tourism industry does not control all or most factors that constitute a tourist destination, and since the impacts on the host population and the environment can be significant, it is absolutely necessary that the governments at highest levels establish comprehensive public administrative systems that ensure proper planning and development of tourism industry.

5.4 Sustainability and not tourism numbers (Carrying capacity)

Most of the tourism attractions in developing world, willingly or unwillingly, have become and are becoming victims of mass tourism for the two simple reasons: a) the tourists from affluent developed countries find these destinations cheaper, exotic and increasingly affordable; and b) the reckless promotion of tourism by the developing countries in their dire need (rather greed) of generating foreign exchange. The governments of the developing countries need to focus on their environmental, socio-cultural and economic carrying capacity, rather than fixating on increasing tourist numbers. The alternative forms of tourism that ensure sustainability of destinations and reduce harmful socio-cultural and environmental effects need to be prioritized.

5.5 Labor migration & Seasonal un-employment

Developing countries, for example India, are characterized by sparsely segregated tourist attractions with high seasonality. These factors involve either the high migration of labor from non-tourist areas to tourist attractions and even from other industries (such as agriculture and fisheries) to tourism industry. The spatial migration of labour on the one hand creates an additional infrastructure pressure for basic public services like health, education etc., and on the other hand the sectoral migration of labor involves the opportunity cost which is often ignored by the developing countries in estimation of tourism's economic impacts. Also the characteristic of tourist destinations being seasonal in nature leads to seasonal unemployment, rendering a large number of people unemployed for a considerable period of time.

6. Recommendations

In order to enhance the contribution of the tourism sector to economic growth of developing countries, viz. a viz. not compromising with the sustainability of destinations, developing countries need to focus on establishing a robust national tourism strategy that incorporates:

- 6.1 Effective policy framework and legislation** - the developing countries should create a robust policy and regulatory framework concerning tourism which ensures the safeguard of the environment, protection of host communities and preservation of local culture.
- 6.2 Extensive but balanced spatial development of tourism circuits**—to avoid the problems of labor migration and seasonal unemployment, developing countries need to encourage spatially balanced tourism development. This could be encouraged through developing alternative forms of tourism in peripheral areas of these countries.
- 6.3 Development of local human capital**- one of the important sources for reaching out to local communities through tourism is by giving priority to local employment. This can be done through educating and training local communities to make them capable of taking up employment in tourism activities.
- 6.4 Local communities and tourism development**— local communities are actual recipients of all odds which come as a result of tourism development. For the sustainability of tourist destinations it is very important that the benefits

of tourism activities percolate to the local communities. The involvement of local communities in planning, developing and serving the tourist industry will ensure that the benefits will reach out to the host community.

6.5 Protection of environment and culture – the presence of huge physical infrastructure at the remotest and ecologically fragile tourist destinations creates a huge burden on the local environment. The decisions to develop new infrastructure should not be taken hastily, however should follow rigorous assessments of environmental impacts. Alongside the environment, the tourism development gives rise to many social dis-benefits also. The development should not only focus on the economic returns but also in terms of impact such development has on local culture and society.

6.6 Educating tourists and the hosts – many of the tourist destinations in developing countries have suffered due to insensitivity of both tourists as well as the hosts. Tourists on the one side, at times, are insensitive to the environmental and socio-cultural settings of the host communities; on the other side the host communities exploit tourists in their desire to derive as much economic benefits from tourists as possible. For the sustainability of a tourist destination it is extremely important that both tourists and hosts are educated to be respectful of and sensitive to each other.

7. Conclusion

Tourism is an ever expanding global industry with the potential to impact the host countries in both positive and negative ways. More lately tourism has witnessed faster growth in tourist arrivals across the globe. In 2011, international tourist arrivals stood at 983million; the UNWTO estimates that they will reach to 1.6 billion in 2020 and to 1.8 billion in 2030. Developing countries are witnessing an increased market share in international tourist arrivals, at 47% in 2012 and are estimated to reach 57% by 2030. The increasing trend of international tourist arrivals in developing countries provides opportunities for tourism based economic prosperity in these countries. However, at the same time it has a potential to produce impacts that are potentially threatening to the local environment and socio-cultural settings. In many developing countries, tourism has been promoted recklessly in absence of proper planning and protective systems which has produced impacts contrary to host communities and their local environmental settings. While tourism can be a force for economic prosperity, much depends on the way this sector is planned, developed, promoted and managed. Developing countries can achieve the developmental goals through tourism and optimize its benefits, only if it is respectful of the environment and mindful of the social and cultural settings of the local communities. The host destination and community has to be placed at the center of the development process. The governments of the developing nations are primarily responsible for ensuring that tourism grows in a sustainable manner. However, the tourists and the host communities have also to play a crucial role towards being sensitive to each other. All this together will determine whether tourism takes a path that helps or hinders the development in developing countries.

Authors Bio Note

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