

TOURISM DYNAMICS, TOMORROW'S TOURIST BEHAVIOR, TOURISM DEVELOPMENT STRATEGY

Summer Course

Innovation in Tourism and Sustainable Regional Development

Azores 3-10 September 2011

1. SHORT AND LONG TERMS DYNAMICS

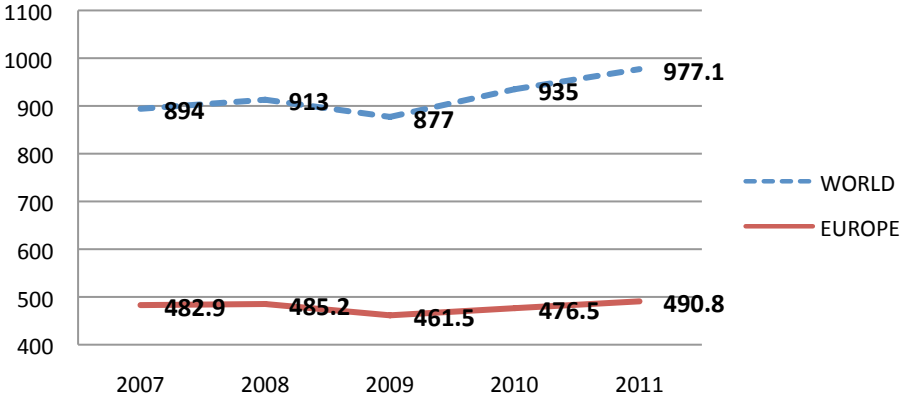
2. TOURIST BEHAVIOR IN THE FUTURE

**3. THREE TOOLS TO CONDUCT TOURISM
STRATEGY**

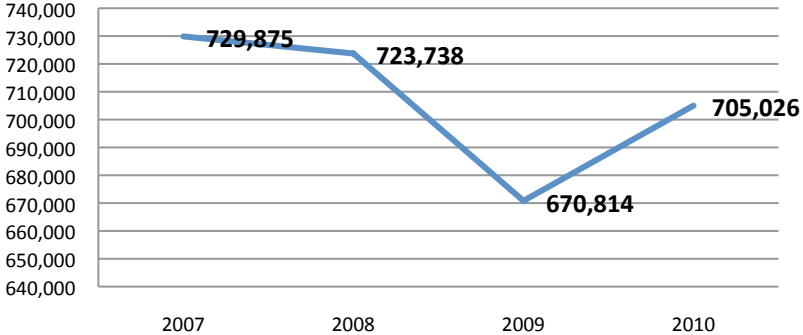
1. SHORT AND LONG TERMS DYNAMICS

2007-2011: SHORT-TERM DYNAMICS

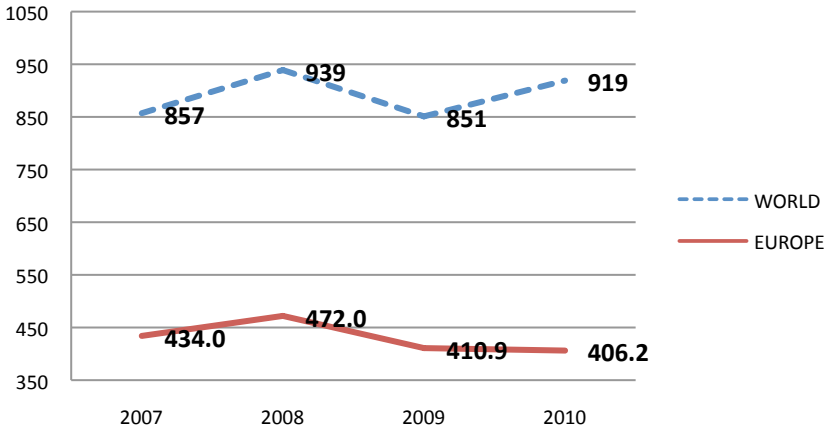
MILLIONS INTERNATIONAL ARRIVALS



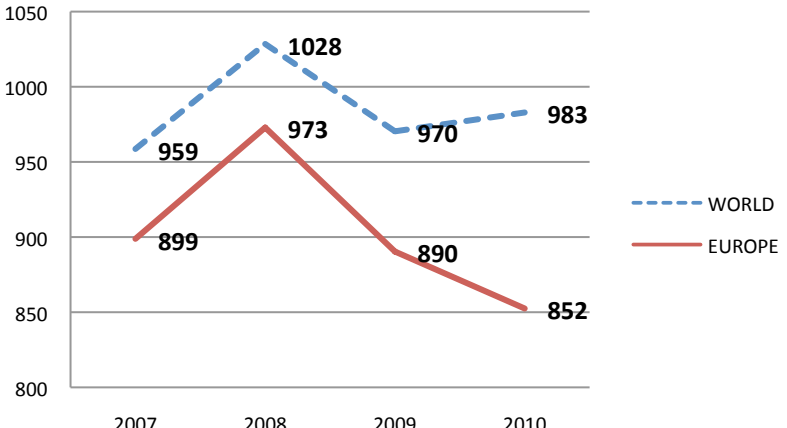
THOUSANDS HOTELS BED NIGHTS IN EUROPE



BILLIONS US\$ RECEIPTS



RECEIPT PER TOURIST(US\$)



1. SHORT AND LONG TERMS DYNAMICS

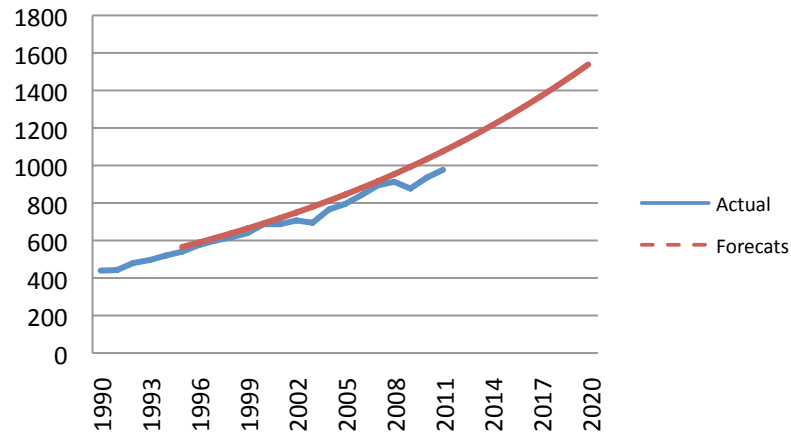
2007-2011: TOURISM SHORT TERM DYNAMICS

- 1. The deepest recession for the last 20 years**
- 2. A quick recovery for the world, slower in Europe**
- 3. Receipt per tourist decreases during the recession**

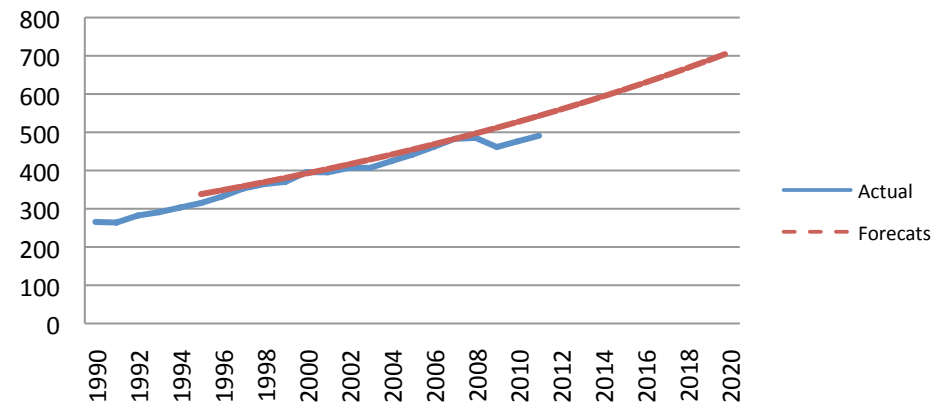
1. SHORT AND LONG TERMS DYNAMICS

LONG TERM DYNAMICS

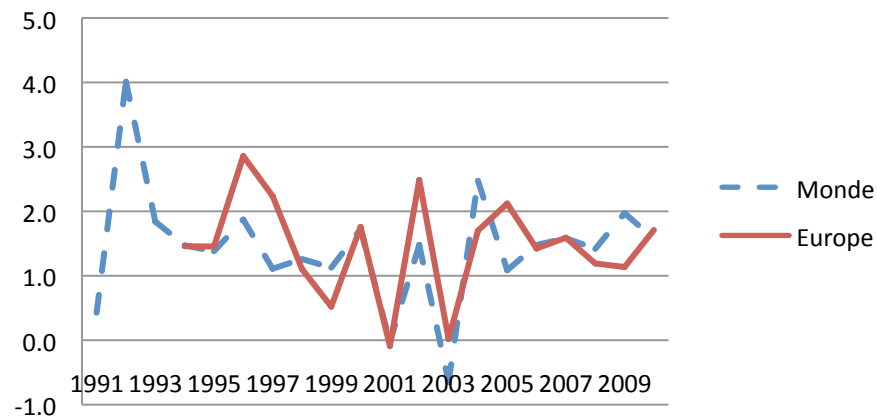
WORLD



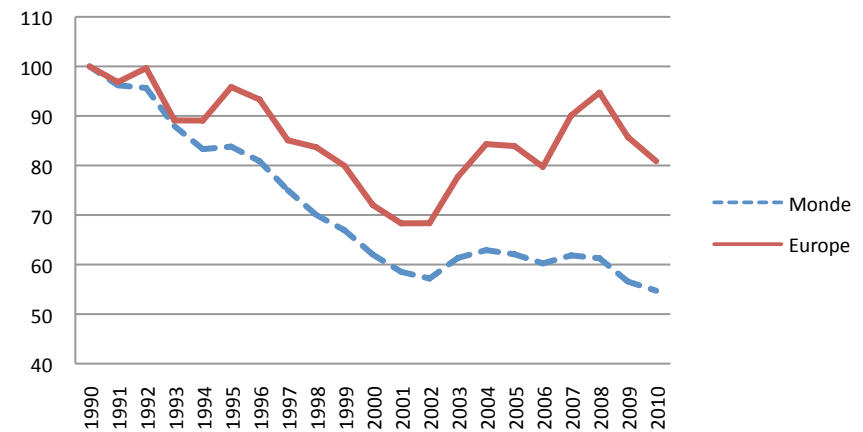
EUROPE



ELASTICITY OF ARRIVALS TO GDP



INDEX OF RECEIPT PER TOURIST



1. SHORT AND LONG TERMS DYNAMICS

LONG TERM DYNAMICS

- 1. Tourism recession of 2009 seems not being able to reduce WTO's forecasts for 2020**
- 2. International arrivals of tourists overreact to short run economic growth**
- 3. Decreasing trend of receipts by tourist and of average length of stay in European hotels**

1. SHORT AND LONG TERMS DYNAMICS

A BRIEF SYNTHESIS

Tourism arrivals will continue to grow; the problem will not be demand, but competition among destinations with a thriftier (time and money) tourist.

2. TOURIST BEHAVIOR IN THE FUTURE

- 1. EUROPEAN BEHAVIOR DURING THE CRISIS**
- 2. PROFILE OF THE FUTURE TOURIST**

2. TOURIST BEHAVIOR IN THE FUTURE

EUROPEAN BEHAVIOR DURING THE CRISIS

- 1. Tourism is deeply rooted in the european consumption structure**
- 2. Sensitive to expectations**
- 3. Tourism planning depends on a mix composed of:**
 - a. Value for money
 - b. Security
 - c. Quality

2. TOURIST BEHAVIOR IN THE FUTURE

EUROPEAN BEHAVIOR DURING THE CRISIS

4. Choosing a destination depends on a mix composed of:

- a. Notoriety : overall attractiveness
- b. Cultural heritage
- c. Entertainment

5. Tourism consumption is doubly influenced by Internet

- a. By easing self organization of the trip
- b. As the second information channel

2. TOURIST BEHAVIOR IN THE FUTURE

WHO IS THE FUTURE TOURIST IN 2020?

An individualistic expert, looking for experiments, “more in search of himself than to discover unknown places” (Bergery and Eckersley, 2007)

- European
- Educated and well informed
- Bargainer
- Individualistic

2. TOURIST BEHAVIOR IN THE FUTURE

WHAT DOES THE FUTURE TOURIST WOULD LIKE :

- **Comfort**
- **Quality product**
- **Limited risk**
- **Well being, health**
- **Personalisation**
- **Innovative escapade /new experiments**

□ **“Having the standard and be different”** (Lohman, 2007)

2. TOURIST BEHAVIOR IN THE FUTURE

TRENDS

- Demand growth, less European

THE TOURIST

- Sensible to expectations, to notoriety
- Thriftier (time and money)/Bargainer
- Decide negatively/positively
- Educated, well informed
- Individualistic

LOOK FOR

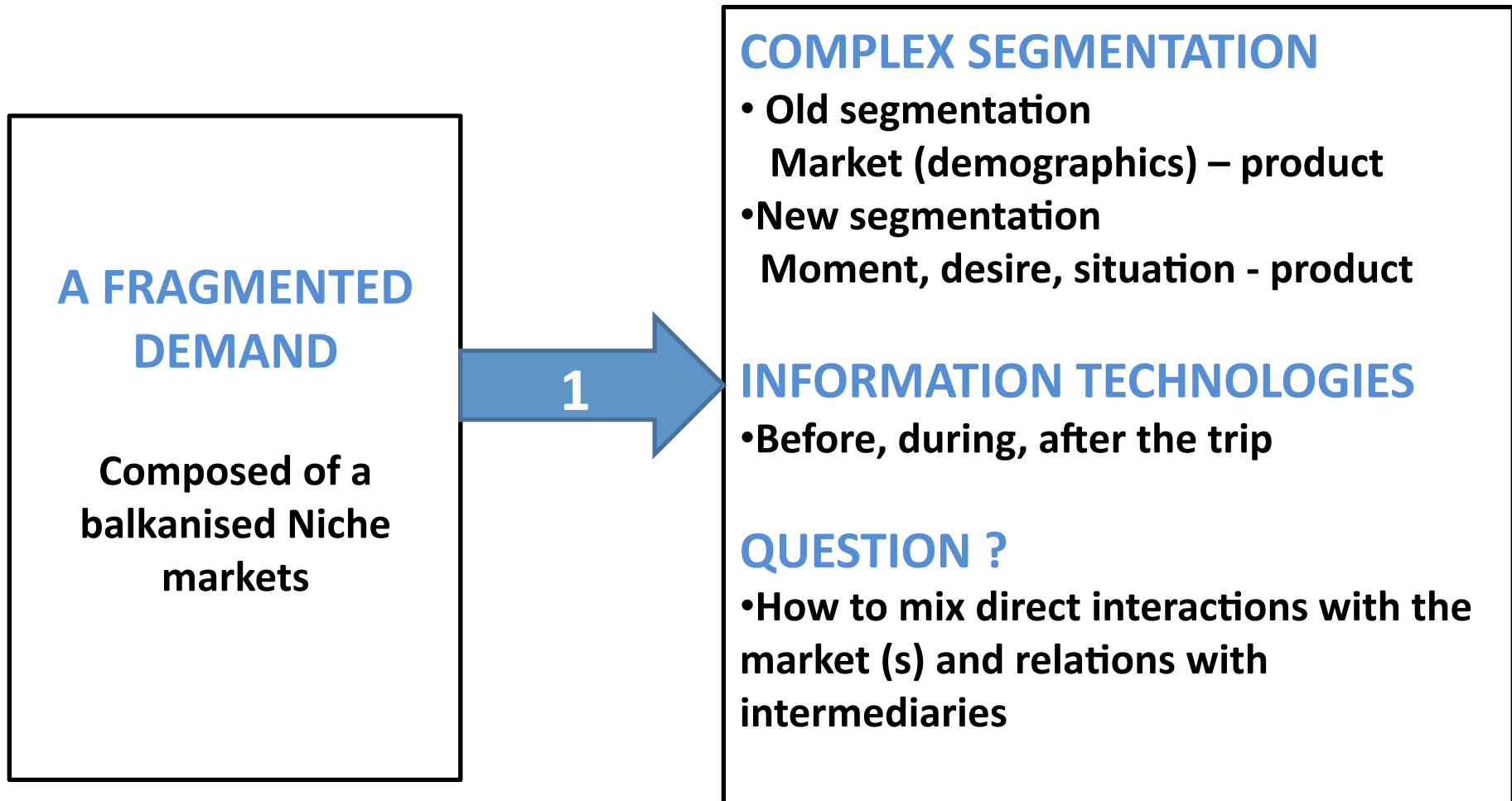
- Comfort, security, health, well being
- Value for money, quality
- Innovative-experiment product



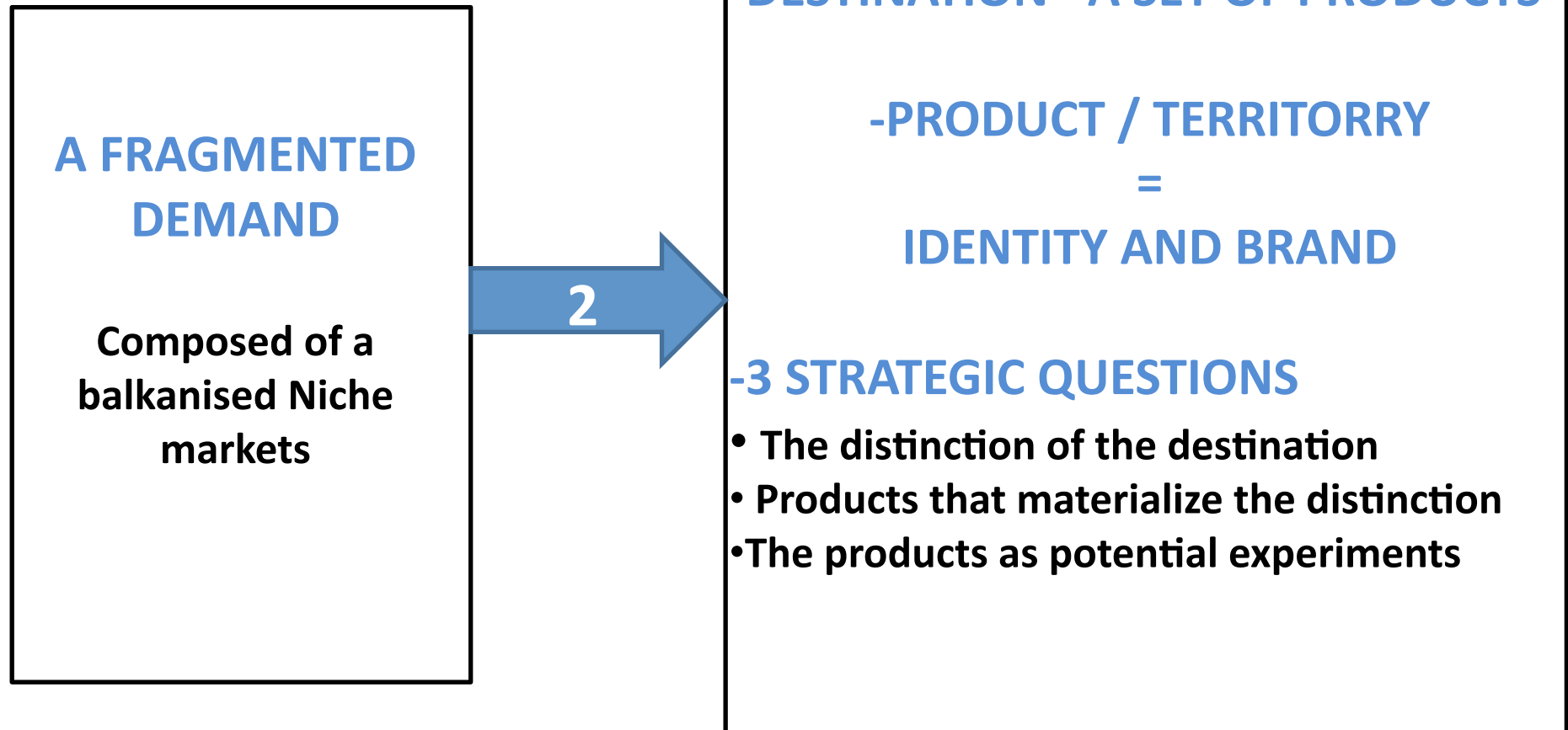
A FRAGMENTED DEMAND

Composed of a
balkanised Niche
markets

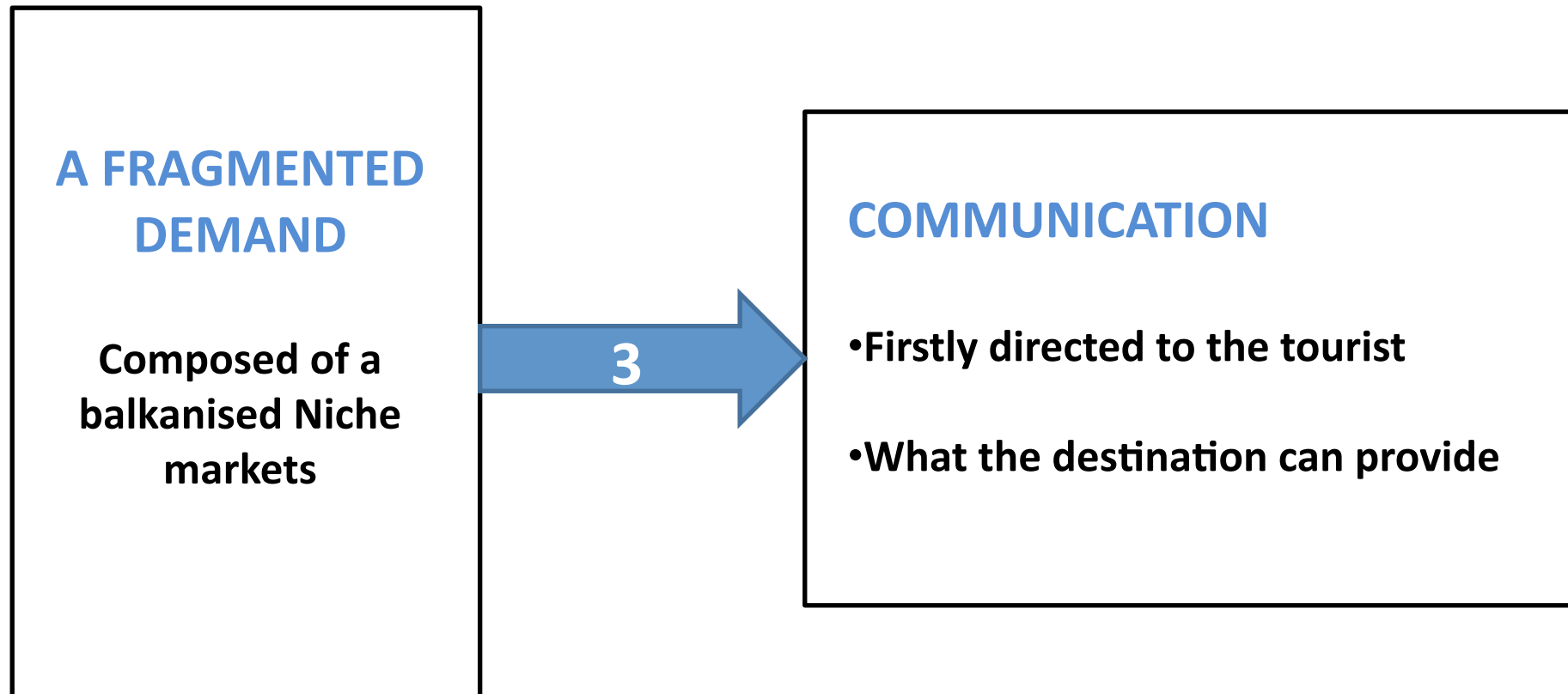
3. THREE TOOLS FOR TOURISM STRATEGY



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