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Tourism: Analysis of a Global Phenomenon from a Perspective of Sustainability

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1. Introduction

Many international institutions have highlighted the importance of tourism as a motor of social transformation and a instrument for promoting economic development (OECD, 2009; UNWTO, 2005; WTTC, 2005). Its potential for growth is considered to be such that, at a horizon of no more than ten years, tourism is expected to generate 11.3 per 100 of world GDP and 8.3 per 100 of employment (WTTC, 2005). The economics literature concurs with this view. From analyses of the role of international tourism in the provision of foreign exchange and its contribution to compensating trade deficits in the balance of payments, to its capacity to generate employment or to increase tax revenues and with them the possibilities of public intervention to improve the welfare of the country's citizens, there have been many contributions that recognize the potential of tourism as an instrument of economic development (among others, see Cooper, Fletcher, Fyall, Gilbert & Wanhill, 2008; Cortés-Jiménez & Artis, 2005; Goded, 2002; Lanza & Pigliaru, 1994; Lanza et al., 2003; Lickorish & Jenkins, 2000; Pearce, 1989; Pulido & Sánchez, 2010; Sinclair 1998; Sinclair & Stabler, 1997; Tribe, 2005; Vanhove, 2005).

The concept of "globalization" has been the subject of considerable debate, which has still not come up with a clear and widely accepted definition. Some argue that the driving force behind the process is economic, while others stress political and even cultural aspects. Whatever the case however, there is a certain consensus on understanding globalization as a dynamic phenomenon which has accelerated noticeably in the last decade (Randolph, 2007), which is multidimensional (Martin, 2001; Shademan, 2009), and which affects the world as a whole thus distinguishing it from the other ways in which countries open up to the international arena. As Vujakovic (2009: 5) notes: "*Globalization is a process of growing interaction and interdependence between economies, societies and nations across large distances.*"

In synthesis, there are seen to be three fundamental benefits of globalization: (i) it promotes global economic connectivity, revolutionizing trade flows and conditioning business strategies (Morrison, 2002); (ii) it contributes to the interchange of information, improving comprehension between different cultures and fostering democracy (Bagchi, 2007); and (iii) in the more globalized countries, it generates growth in revenues and in the quality of life of its inhabitants (Randolph, 2007). Some of the major arguments against globalization are: (i) the "improvement" in living standards in fact occurs in developed countries at the expense of developing countries; (ii) business relocation is directed towards those developing countries that have the lowest labour costs and least social protection; (iii) the primacy of the

pursuit of increased profits generates abuses of the local population's social and environmental rights; (iv) local people's cultural identity is at continual risk due to the abuse of the Internet and the generalization of consumerism; etc.

With respect to tourism in particular, the last decade has seen an interesting debate about whether the sector has already reached a high level of globalization. As noted above, most of the literature assumes that tourism is an activity which connects the richest parts of the world to peripheral areas, and can thus contribute to improving the wealth and living standards of the less developed countries. Nevertheless, there are those who have questioned this role, identifying a number of aspects that they see as evidence that tourism is not an example of globalization. Above all, they believe that tourism generates a set of negative impacts on the destination territories which merit an overall evaluation of the effect of promoting tourism in them. As Aramberri (2009: 367) notes: "*While it is an activity practised all over the world, it is scarcely global.*"

A twofold hypothesis is defended in the present chapter. On the one hand, while tourism will undoubtedly be one of the activities contributing to intensifying the phenomenon of globalization in the coming decades, this contribution will be asymmetrical since it will not affect all geographical areas equally. And on the other, as a global phenomenon, tourism is facing a major, also global, challenge which is to ensure sustainability, especially if one considers that, as acknowledged by the World Tourism Organization (UNWTO), in 2020 the number of international arrivals will reach 1.6 billion.

With this as the goal, the following sections will address three main topics. First, using official figures from the UNWTO, we shall examine the process of growth and simultaneous globalization of tourism which is involving ever more countries. Second, we shall analyze the principal motors of global change faced by tourism which will shape its evolution as a global phenomenon. And third, we shall identify the characteristics that a new flexible, adaptive, and experimental tourism management model should have, based on the principles of sustainability so as to respond to this new scenario of global change.

2. The globalization of tourism: facts and figures

Tourism has undergone significant growth worldwide (over 6 per 100 per annum in terms of international tourist arrivals) since its emergence as a mass phenomenon in the 1950s. As well as this overall growth, the other striking aspect is its steady expansion as a global phenomenon, progressively spreading into all regions of the world and most countries.

Indeed, there have been some interesting changes since the 1950s in the direction of tourist flows worldwide, with an especially noticeable steady increase of arrivals of international tourists in Asia and the Pacific (which in 2010 received 21.8 per 100 of the total, compared with 0.8 per 100 in 1950), and to somewhat lesser extents in the Middle East (6.4 per 100 in 2010 compared to 0.8 per 100 in 1950) and Africa (5.2 per 100 compared to 2 per 100 in 1950). At the same time, Europe continues to maintain a far from negligible market share of 50.4 per 100 in the volume of tourist flows worldwide, although in relative terms it has declined from 66.4 per 100 in the 1950s. The same relative downward trend has occurred in the Americas, which have gone from a market share of 29.64 per 100 in 1950 to 16.2 per 100 in 2010.

The year 2010 has been a turning point in the downward trend of the main global data on tourism in recent years (Table 1). Powered by improving economic conditions worldwide, international tourism has recovered faster than expected from the effects of the world

financial crisis and economic downturn of late 2008 and 2009. International tourist arrivals increased by 6.7 per 100 compared with 2009, with positive growth in all regions of the world. In absolute terms, the number of arrivals reached 935 million, surpassing by 58 million the 2009 figure and by 22 million the pre-crisis peak of 2008 (913 million). In addition, although all regions recorded growth in international arrivals, the main drivers of the growth continued to be the emerging economies. This two-speed recovery, slower in the advanced (5 per 100) and faster in the emerging (8 per 100) economies, is a reflection of the global economic situation, and will dominate 2011 and the foreseeable future.

The sub-regional results also clearly reflect the different speeds of recovery. Some subregions, such as North and Sub-Saharan Africa and Southeast Asia, were unaffected by the global crisis, and showed continued growth throughout 2009 and 2010. Among the subregions that had been affected by the crisis in 2009, the 2010 arrivals in Northeast and South Asia, North and South America, and Western Europe fully offset the earlier losses, reaching levels equal to or even higher than the pre-crisis situation. The Caribbean and Central America, however, have barely recovered their 2008 levels, and the growth in Central and Eastern Europe, and Southern Europe and the Mediterranean has been insufficient to offset the tourist flow loss in 2009, and Northern Europe presented no positive figures in 2010.

Asia was the first region to recover, and was that with strongest growth (13 per 100) in 2010. International tourist arrivals in Asia reached a new record of 204 million, compared to 181 million in 2009. Africa (6 per 100, 49 million arrivals), the only region with positive figures in 2009, continued to grow in 2010, benefiting from the increased economic dynamism and events such as the World Cup in South Africa. The Middle East returned to growth with double-digit results (14 per 100, 60 million arrivals), with an increase of 10 per 100 or more in almost all of its destinations.

Recovery in Europe (3 per 100, 471 million arrivals) was slower than in other regions. This partially reflected the interruption of air traffic following the eruption of Eyjafjallajökull and the economic uncertainty affecting the euro zone. Although the sector has gained momentum in the second half of the year, with performances above the regional average in some countries, it has not been enough to revert the overall losses of 2009.

The Americas (with a growth of 8 per 100, 151 million arrivals) recovered from the fall of 2009 that had been caused by the economic difficulties of North America and the impact of the outbreak of influenza-A(H1N1). The return of the U.S. economy to growth has helped improve the performance of the region as a whole, as has the progress of regional integration in Central and South America, and the vitality of Latin American economies. The greatest growth corresponded to South America (10 per 100).

Together with international tourist arrivals, the other variable that is commonly used as a measure of the evolution of world tourism is the volume of receipts (Table 2). During 2010, the growth of international tourism receipts lagged somewhat behind that of arrivals, as is usual during periods of recovery. Among the main markets in terms of external tourism expenditures, it has been the emerging economies which have been driving growth: China (17 per 100), the Russian Federation (26 per 100), Saudi Arabia (28 per 100), and Brazil (52 per 100). Among the traditional source markets, there has been recovery in the cases of Australia (9 per 100), Canada (8 per 100), Japan (7 per 100), and France (4 per 100), with modest growth (2 per 100) in the U.S., Germany, and Italy. In contrast, external tourism expenditures of the U.K. during 2010 fell by 4 per 100.

	International tourist arrivals (millions)								Market share (%)	Change (%)		Mean annual growth (%)
	1990	1995	2000	2005	2007	2008	2009	2010		2010	09/08	
World	438	533	683	802	901	913	877	935	100	-4.0	6.7	3.35
Advanced economies	300	339	423	451	496	489	468	493	52.7	-4.3	5.3	1.50
Emerging economies	138	194	260	351	405	424	409	442	47.3	-3.5	8.2	6.36
By WTO region												
Europe	265.0	309.1	392.2	441.0	485.4	480.8	456.9	471.5	50.4	-5.0	3.2	1.84
Northern Europe	28.6	35.8	43.7	52.8	58.1	56.4	53.4	53.3	5.7	-5.5	-0.1	2
Western Europe	108.6	112.2	139.7	141.7	153.9	153.2	148.6	156.1	16.7	-3.0	5.1	1.07
Central/Eastern Europe	33.9	58.1	69.3	87.5	96.6	100.0	89.9	93.7	10.0	-10.1	4.2	3.20
Southern/Medit. Europe	93.9	103.0	139.5	159.1	176.8	171.2	165.1	168.4	18.0	-3.5	2.0	1.88
Asia & the Pacific	55.8	82.0	110.1	153.6	182.0	184.1	181.0	203.8	21.8	-1.7	12.6	7.74
North-east Asia	26.4	41.3	58.3	86.0	101.0	101.0	98.1	111.7	11.9	-2.9	13.9	8.33
South-east Asia	21.2	28.4	36.1	48.5	59.7	61.8	62.1	69.6	7.4	0.5	12.1	8.44
Oceania	5.2	8.1	9.6	11.0	11.2	11.1	10.9	11.6	1.2	-1.6	6.0	1.89
South Asia	3.2	4.2	6.1	8.1	10.1	10.3	9.9	10.9	1.2	-3.4	10.1	7.15
Americas	92.8	109.0	128.9	134.0	143.9	147.8	140.5	151.2	16.2	-4.9	7.7	1.57
North America	71.7	80.7	91.5	89.9	95.3	97.7	92.1	99.2	10.6	-5.8	7.8	0.77
Caribbean	11.4	14.0	17.1	18.8	19.8	20.1	19.5	20.3	2.2	-2.8	3.9	1.70
Central America	1.9	2.6	4.3	6.3	7.8	8.2	7.6	8.3	0.9	-7.4	8.3	8.46
South America	7.7	11.7	15.9	19.0	21.0	21.8	21.3	23.5	2.5	-2.3	10.4	4.35
Africa	14.8	18.9	26.5	35.4	43.2	44.4	45.8	48.7	5.2	3.2	6.4	7.62
North Africa	8.4	7.3	10.2	13.9	16.3	17.1	17.6	18.6	2.0	2.5	5.8	7.49
Subsaharan Africa	6.4	11.6	16.3	21.5	26.9	27.2	28.2	30.1	3.2	3.6	6.9	7.70
Middle East	9.6	13.7	24.9	37.8	46.7	55.9	52.7	60.0	6.4	-5.7	13.9	12.81

Table 1. International tourist arrivals.

Note: 2010 data provisional. Source: UNWTO (2010) and UNWTO World Tourism Barometer.

Regarding the outlook for the future, the UNWTO (1995) published a study forecasting and evaluating the evolution of tourism in the first twenty years of the new millennium. It foresaw, besides the natural expansion of tourism flows and receipts, a consolidation of the process of globalization, with a significant percentage of the growth being directed towards regions that currently have lower market shares, and thus leading to a better distribution of tourism flows worldwide.

Notwithstanding the irregularity of tourism flows in recent years, the UNWTO for the moment maintains its long term forecast, considering that the structural trends underlying the forecast have not changed significantly. Indeed, experience has shown that, in the short term, there alternate periods of strong growth (1995, 1996, 2000, and 2004–2007) with periods of low growth (2001–2003, 2008, 2009), and indeed, for the period as a whole, the UNWTO expectation is being borne out.

The UNWTO foresees international arrivals reaching almost 1.6 billion in 2020, of which 1.2 billion will be intra-regional and 0.4 billion long-distance travelers. For the total of tourist arrivals by region, in 2020 the top three receptor regions will be Europe (717 million tourists), East Asia (397 million), and the Americas (282 million), followed by Africa, the Middle East, and South Asia.

	International tourism receipts				\$ US			€ Euro		
	Local currency, constant prices (%)			Share (%)	Billions		Per arrival	Billions		Per arrival
	07/06	08/07	09/08	2009	2008	2009	2009	2008	2009	2009
World	5.5	1.3	-5.6	100	941	852	970	640	611	690
Advanced economies	4.9	1.9	-6.7	64.2	613	547	1160	417	392	830
Emerging economies	6.8	0.1	-3.7	35.8	328	305	740	223	219	530
By WTO region										
Europe	2.7	-1.2	-6.6	48.5	473.7	413.0	900	322.0	296.1	640
Northern Europe	4.0	-2.0	-2.9	7.1	70.2	60.9	1140	47.8	43.6	820
Western Europe	2.2	-2.3	-7.2	16.9	162.2	143.7	980	110.3	103.0	710
Central/Eastern Europe	8.9	2.1	-8.2	5.6	57.8	47.4	530	39.3	34.0	380
Southern/Medit. Europe	0.9	-0.8	-7.0	18.9	183.5	161.1	940	124.7	115.5	680
Asia & the Pacific	10.0	4.6	-0.7	23.9	208.9	203.7	1120	142.1	146.1	810
North-east Asia	8.3	8.4	0.7	11.8	99.9	100.3	1020	67.9	71.9	730
South-east Asia	16.0	-1.0	-6.3	6.4	59.8	54.3	870	40.6	38.9	630
Oceania	6.4	2.9	5.2	3.9	33.7	33.5	3080	22.9	24.0	2210
South Asia	6.8	7.4	-0.2	1.8	15.5	15.6	1150	10.6	11.2	1110
Americas	6.6	4.9	-10.1	19.4	188.1	165.2	1180	127.9	118.5	840
North America	7.6	6.9	-12.3	14.0	138.9	118.9	1290	94.5	85.2	930
Caribbean	0.9	-3.1	-4.9	2.6	23.6	22.2	1140	16.1	16.0	820
Central America	10.6	-1.1	-7.1	0.7	6.4	5.9	770	4.3	4.2	550
South America	6.8	2.4	-1.3	2.1	19.2	18.2	850	13.1	13.0	610
Africa	9.7	-3.5	-4.3	3.4	30.2	28.9	630	20.5	20.7	450
North Africa	7.4	-3.9	-4.3	1.2	10.8	9.9	570	7.3	7.1	410
Subsaharan Africa	10.9	-3.3	-4.2	2.2	19.4	19.0	670	13.2	13.6	480
Middle East	9.4	0.8	-0.8	4.8	39.7	41.2	780	27.0	29.6	560

Table 2. International tourism receipts.

Source: UNWTO (2010).

East Asia and the Pacific, South Asia, the Middle East, and Africa are expected to grow by more than 5 per 100 per annum compared to a world average of 4.1 per 100. The more mature regions of Europe and the Americas are expected to have growth rates below the average. Europe will maintain its position as having the greatest share of arrivals, although it will decrease from 60 per 100 in 1995 to 46 per 100 in 2020.

Globalization in tourism affects all aspects of demand, supply, and intermediation. Go & Van't Klooster (2006) argue that globalization helps to blur geographic and economic boundaries, the limits on firms accessing different markets, and the barriers to the free movement of persons. This is a radical change for which tourism managers need to be prepared, opening their minds to the move from local management of tourism to global management.

3. The motors driving the global changes facing tourism

There have been many reports on the recent trends that have affected the field of tourism. Most have focused on three main areas of analysis: changes in consumer behaviour in tourism, the influence of the technological revolution on the processes of production and consumption in the sector, and concern for the longer term effects of over-sizing tourism, especially for the pressure on the destination's natural capital. In recent years there has also been a growing concern about the compatibility between tourism development and the resident population's quality of life (Aguilar, 2007; Riera, 2009; Sharpley, 2003).

Apart from the many, and often very interesting, company and consultancy reports devoted to the analysis of trends in recent years, the analysis of the drivers of the global change which tourism is facing has predominantly used the literature of tried and tested authors in the field of tourism research (Cooper, Fletcher, Fyall, Gilbert & Wanhill, 2008; Dwyer, Edwards, Mistilis, Roman & Scott, 2009; Edgell et al., 2008; Goldin, 2010; Page, 2009; Riera, 2009). A brief review of this literature follows.

3.1 Economic motors of change

The current global economic crisis has shattered all earlier expectations about economic trends, and has made any analysis in the medium to long term particularly difficult. There does however seem to be a consensus among the most prestigious analysts and financial institutions that the crisis is shaping a different world, characterized by scarcity and by uncertainty about the future. To the enormous difficulties of the global financial system, there have to be added for the main source markets of tourist flows (the developed countries) four other negative factors: unemployment, the relative impoverishment of the middle classes (the real protagonists of what came to be called the "democratization of travel"), debt (in the private sector, but also sovereign debt and budget deficits), and the squeeze applied to business and family credit. This last has had the consequence of a growing fear that the difficulties may be here for the long stay, resulting in an overall reduction in consumption as an austerity measure in response to the uncertainty – a situation that the Slovenian philosopher Slavoj Žižek summed up as "purely and simply a way of life".

The reality is that, while the U.S., Japan, and even the European Union (in this case, with tremendous inequality between countries) have regained the path to growth in 2010, no one dares to predict flatly that this is the end of the problem, let alone in certain countries which are continuously threatened by an "attack" from the financial markets. And in any case, even if the crisis were definitively past, the last four years have revealed major weaknesses in the current model of growth (the scarcity of raw materials including oil, the demographic challenge, climate change, migration, the abuse of power on the part of financial markets, the globalization of threats to security and world peace, the radical change in many of the values that have underpinned global coexistence since the end of World War II, etc.) which require countries to react through deep structural reforms to modify the current patterns of the model of growth and to regulate certain aspects at a global scale. It is still of course too early to see how good the results of these policies are going to be. Indeed, in the view of some experts they are too little to tackle the change that is really needed. Consequently, it is presently very difficult to guess what the economic motors of global change will be.

Whatever the case, the phenomenon of globalization, driven by the technological revolution, leads to increased freedom of movement of capital, goods, services, and, of course, people.

For the travel industry, this means both greater mobility of global tourist flows and increased competition among international destinations (Dwyer et al., 2009).

Moreover, the stress that public finances have been subjected to during the crisis has led to stabilization policies that are already affecting, and will affect even more in the future, governments' capacity for intervention, since they find themselves forced to curtail public spending. One must not forget that, until now, a significant portion of the investment in the development and management of tourism has come from the public sector, whether in terms of stimulating the development of the activity, the provision of public services, or the promotion of the destination. Instead, governments are now beginning to see tourism as a sector to obtain financing from, rather than as an activity to invest in. Indeed, the justification given for the implementation of "green taxes" during 2010 in Germany, the U.K., and Austria (the Netherlands introduced it in 2008, but withdrew it a year later) in the form of an environmental air tax was the impact generated by tourism. It seems, however, merely to have been an effort to generate revenues, especially given that the receipts have no fixed destination, so that there is no guarantee that they will be spent on improvements in terms of sustainability¹. The case is similar with the "tourism tax" recently implemented in Rome (and already being considered by other cities including Venice and Barcelona, although in the case of Spain the possibility has been rejected by the nation's Congress of Deputies). The justification given for this is the need to sustain the city's efforts in the organization of urban services and hence guarantee that tourists will benefit from better reception and services.

The credit crunch is another of the current situation's dangers both for companies, since it slows down their investment projects, and for consumers, because it affects their capacity to consume. In the latter case, price has become a key factor in tourists' purchasing decisions. The purchasing process has become lengthier, since customers shop around more carefully, compare, ask other people's opinion, and wait until the last minute to book and pay in instalments or by credit card. Experts agree that this trend is likely to be consolidated in the medium to long term, towards a more thoughtful consumer who seeks to maximize experiences, get the best service, and at the lowest price. And of course the Internet is playing a determining role throughout this process.

In contrast, developing countries are increasingly relevant as sources of tourists and business travelers. According to a recent Goldman Sachs report, two thirds of global economic growth over the next five years will take place in Brazil, Russia, India, and China (whose initials form the acronym BRIC). This growth will result in an increase in the middle classes of those countries, and consequently in a rise in their tourism. I.e., the North Americans and inhabitants of northern Europe who have traditionally dominated the travel industry will gradually give way to Brazilian, Russian, Indian, and Chinese tourists and business travelers. Indeed, according to the latest figures published by the WTO, two of the BRIC countries already figure in the world's top 10 source markets for tourism spending.

But the BRIC countries will not only have growing importance as sources of tourists, but also as receptor countries². In this context, one must also consider the emergence of a

¹ It has even been suggested that the application of these taxes distorts competition in leading passengers to migrate to airports, airlines, and destinations unaffected by their implementation – hence the proposal that such decisions need to be taken within the framework of the European Union as a whole.

² In China, according to data released by the Chinese Government itself, 10 243 new hotels have opened between 1999 and 2008. In Brazil, according to Embratur data, in 2010 Spanish firms invested \$157

growing number of new destinations around the world. This is a consequence of the expectations for development that this activity generates, changes in the habits of tourists, the need for travel multinationals to diversify their business, the efforts of developing countries to remove barriers to the entry of travelers, improved transport, and easier access to the source markets, with the last two reasons being the result of the revolution in technology.

This increasing international competition will end in generating an ever more dynamic private sector. The pressure of this growing competition, together with firms' reduced access to financing, stricter environmental constraints, and changes in the traveler's purchasing behaviour and expectations will result in increased demand for the more efficient use of resources (Dwyer et al., 2009).

3.2 Environmental motors of change

Tourism is closely related to the environment, a limited asset which has to simultaneously provide ecological functions that are vital for the survival of ecosystems, and services that are essential to human activities. The natural environment provides the physical territorial context in which tourism is developed and a significant portion of the resources required to support the tourism production process of any destination (basic resources such as water and power, and others that are available for tourism and recreational use), and receives much of the waste resulting from production and consumption (Riera, 2009). Indeed, the natural environment and climate have always been considered two of the principal competitive advantages of any tourism destination or business.

Traditionally, the main concerns regarding the relationship between tourism and the environment have focused on the role that the development of tourism might be able to play to help improve the effectiveness of the management of ecologically sensitive areas and the preservation of unique environments (both basically cases of protected areas). In recent years, however, interest has shifted to the analysis of the impact that tourism can have on the environment as a result of exorbitant increases in the use of resources. These concerns include climate change, depletion of natural resources, and loss of biodiversity.

Concern in the field of tourism about the effects of climate change and global warming has been very late in making itself felt (Pulido, 2008). Perhaps the fact that it is a global phenomenon and that its impacts respect no frontiers led to people forgetting that its main effects will be local and regional – rise in sea level, changes in ocean currents, melting glacier and polar ice, loss of snowpack, increased heat indices and high daytime temperatures, and changes in rainfall patterns (Viner & Nicholls, 2006). The foreseeable repercussions of climate change on tourism can be summarized in four main areas (Pulido, 2008: 110-111):

- **Repercussions on the geographic travel space:** It is estimated that in all coastal zones, beach-front infrastructure will be at jeopardy, and freshwater reserves will be affected, further aggravating the already difficult water supply situation in these tourist areas.
- **Repercussions on demand:** The climate is a central motivating factor in choosing a holiday destination. Tourists will try to avoid the places most affected by this phenomenon, replacing them with others or choosing other times of year for their visit.

million, behind only U.S. (\$364 million), Dutch (\$233 million), and French (\$164 million) companies, and the Brazilian government plans to invest more than \$9 billion dollars to modernize airports, roads, and ports, taking as targets the Football World Cup in 2014 and the 2016 Olympics.

- **Repercussions on supply:** Climate variability and changing weather patterns will generate higher levels of uncertainty than are considered normal for business activities. In principle, the source market tour operators and travel agencies will simply respond by offering travel to other places. The most negative and direct impact will affect firms located in the most vulnerable destinations, with the resulting reduction in revenue for these locations, and consequent increase in unemployment.
- **Repercussions on transport:** Transport has a considerable effect on the environment and the climate. The measures so far proposed to mitigate this impact³ can be translated into different forms of increasing the cost of travel. This will result in a retraction of tourism demand for certain zones. Indeed, there is already a clear awareness of the need for destinations to develop sustainable mobility plans, to boost tourism from neighbouring areas, and to introduce less polluting modes of transport.

But tourism is of course not just a victim of climate change – it is also a vector. A study published by the UNWTO (2008) shows that in 2005 tourism generated 4.9 per 100 of total CO₂ emissions, with transport being responsible for the greater part (75 per 100), and air transport in particular accounting for approximately 40 per 100. The Fourth Evaluation Report of the IPCC (2007) estimated that total aviation (domestic and international) currently produces about 2 per 100 of global CO₂ emissions. If there are no radical changes, with an expected air traffic growth of 4.6 per 100 per annum, it is estimated that in 2050 emissions from air transport will have risen to 4.5 per 100 of the global total (Goldin, 2010).

The second major concern is the depletion of natural resources and the loss of biodiversity (Dwyer et al., 2009; Goldin, 2010). The increasing population and growth rates worldwide are conditioning the availability of natural resources. Declining oil production with a dramatic increase in demand will translate into higher fuel costs, generating a growing concern for energy efficiency and greater investment in renewable energies. At the same time, water scarcity will mean increased conflict for the control of water resources. Increased demand will lead to higher food prices, and hence large-scale land clearance in order to increase agricultural production. The result may well be over-cropping of current farmland and loss of original forests.

Moreover, most studies recognize that habitat loss will be the main threat to species conservation and biodiversity. The destinations that will most suffer from these effects will be those that specialize in nature-based tourism.

3.3 Technological motors of change

Technological advances create opportunities for the travel industry, but they also pose a threat. Today's tourism is of course highly dependent on ICT and transportation. The coming years will see the accession of the world of tourism to many technological innovations that will enhance the experience of travelers (David Burton Associates, 2010). The main changes will be through the combination of mobile Internet and the Web's social networks, which should provide travel companies with new opportunities to improve their

³ From 2012, airlines based in EU territories will receive annually a number of emission permits based on the average of those produced between 2004 and 2006. If they exceed these permits, they will have to purchase new permits that have remained unused by the industry or from other firms (always ensuring that there is a part for new entrants). In particular, in 2012 airlines will have to reduce their emissions to 97 per 100 of those made in the aforementioned period, and in 2013 to 95 per 100.

customers' experience. "Telepresence" technologies will complement business travel without replacing it. The futurologist Ray Kurzweil has predicted that, within ten years, computers will for the most part be invisible, embedded in walls, furniture, clothing, and even our bodies. This new scenario will of course not only affect how travel is produced and consumed, but also how it is branded and marketed. Indeed, just this last decade has been prolific in the incorporation of technology into the processes of intermediation.

ICTs also facilitate the incorporation of sophisticated database management systems, providing travel firms with the tools they need to respond to individual preferences and stimulate the tourist's purchases. A result is a reduction in operating costs and an increased capacity to add value for their customers.

Technological advances in transportation have made journeys faster and more comfortable. These changes are taking place in the four basic elements of any transportation system – route, terminal, vehicle, and propulsion. They are leading to improvements in the speed and quality of the journey, minimize waiting times at the terminal, and, in sum, reducing the real cost of travel. The result is greater accessibility of destinations around the world (Cooper et al., 2008). However, the environmental constraints that the sector will have to adapt to in the coming years represent its main challenge in the sense that they will mandate a permanent reduction in the social and environmental costs associated with travel (pollution, congestion, safety, etc.). Likewise, transport will also be affected by future fuel price rises.

The incorporation of technology allows the travel industry to renovate and innovate in its products and services, adding value to them through the use of production technologies that generate competitive advantages (Dwyer et al., 2009). This, together with the ongoing process of disintermediation that the travel industry is living through, implies, as noted by Riera (2009: 129): "*An especially important organizational shockwave which, in consonance with its cross-sectional character, is spreading throughout the fabric of the travel business.*" Hence travel firms' are interested in achieving a greater degree of integration of their activities with the rest of the value chain of tourism, offering a "total travel experience" (Oxford Economics, 2010).

3.4 Political motors of change

Now that the block politics established after World War II has passed into history, a new geopolitical reality has been taking shape. The U.S. still has an important influence, but with an increasingly relative power due partly to the enlargement of Europe which will continue to increase in international influence, but above all to the emergence of China and India as new major global players who are transforming the geopolitical (and, as was seen above, the tourism) landscape worldwide.

In this new geopolitical scenario, peace, security, and political stability are prerequisites for sustainable tourism development. Countries in which there are conflicts, or areas in which there are conflicts between countries, have a severely limited potential to attract tourist flows (Dwyer et al., 2009). This situation may also of course benefit destinations that tourists perceive as "safe". Such was the case in Spain compared with other Mediterranean destinations, which has for years had a privileged position in this regard, broken only at specific times following attacks by the terrorist group ETA.

After the attacks of 11-S, and later in London, Madrid, Bombay, etc., international terrorism has become a major global threat, and has led to increased security measures, especially in

airports and railway stations around the world. But, at least for the moment, it seems not to have affected international tourist flows which have continued to rise year after year despite the discomfort of these measures.

The other major safety threat has to do with the increased risk of the spread of infectious diseases and other health-related crises as a result of the massive displacement of people for reasons of leisure. The response to these increased risks will be stricter border controls, creating barriers or, at least, impediments to tourism⁴.

Destinations will therefore find themselves forced to develop appropriate strategies to deal with such contingencies. Until now, the only approach has been to obviate these difficulties through strategies of "enclave tourism", i.e., isolating the tourists in everything-included resorts (Dwyer et al., 2009). This poses a serious threat to the economy and local society, apart from being a form of neo-colonialism, contrary to the basic principles of sustainability. In the clearly political arena, as problems of access to basic resources (water, fuel, etc.) become increasingly acute in the years ahead, there will be a need for strategies to deal with regional and/or ethnic conflicts for the control of territories that contain valuable resources, preferably before they occur, by reducing the gap between countries with resources and those without, guaranteeing application of the principle of intra-generational and inter-regional equity.

Visa policies will also be the object of attention in the coming years, since they can cause significant distortion of competition between destinations. Thus, while developing countries, including those with non-democratic regimes, are maintaining an openness policy that facilitates the entry of tourists, in developed countries, and especially in the European Union, in just the last few years procuring a visa has been a brake on the growth of tourist flows from emerging outbound markets, and has been the cause of increased tension between travel multinationals and governments. In the case of the European Union, added to this polemic is another of no less importance. This has to do with the economic and environmental impact on airlines represented by having to pass through a fragmented airspace, hence their demand for a single European airspace (a "single sky"). According to SESAR (Single European Sky ATM Research), this would allow direct routes to be designed which, being more efficient, would save 12 million tonnes of CO₂ per annum, not to mention the reduction in departure delays and cheaper travel. The big problem will of course be if the Member States are obliged to cede sovereignty over their airspace, to which one must add the need to redesign the regulatory and institutional framework, and to organize cooperation among states to ensure a single management structure.

In sum, all of the this highlights the need to implement models of governance that ensure the involvement of all stakeholders in the decision making process for the development of tourism. This is the other major challenge facing policy makers in the coming years – to establish a new model of governance that will allow equitable sharing of responsibility for solutions to the problems facing the goal of sustainable management of tourist destinations. The challenge really is no trivial matter. If one really wants to advance in this agenda, it will require institutional reform, the establishment of new instruments of financing (and therefore a revision of existing tax systems), and the design of new juridical frameworks.

⁴ At the last annual summit of the World Travel and Tourism Council held in Beijing in May 2010, tourism multinationals harshly criticized "the mismanagement of these last pandemics" by national governments. This shows how sensitive the tourism industry is to such decisions, and the need for public/private coordination in these matters.

3.5 Demographic motors of change

As recognized by Yeoman, Hsu, Smith & Watson (2010: 19): "*Demography affects everything and everyone in as much as it is the future of terrorism, health care, taxation, of niches in the tourism market, or of the food supply.*" Among the main drivers of global change related to demographic trends, two stand out – world population growth and ageing of the population. Indeed, the concept of age is becoming ever more complex: as noted by Dwyer et al. (2009), children become adults more quickly, while adults want to be teenagers.

The sociologist Michael Young coined the term "multi-generational family", also called the "vertical family" to refer to changes taking place in family structure. The increase in longevity and the existence of smaller households (a result of families having fewer children) are giving rise to a family structure that grows vertically rather than horizontally, in which three, four, and even five generations may be living together (Yeoman et al., 2010). This substantially modifies the possibilities and forms of travel – the whole family may travel together; parents do not necessarily have to travel with their children, since they can leave them in the care of grandparents; the grandparents can travel with the grandchildren; etc.

But, in addition to changes in family structure, social structures are also changing. Society is becoming increasingly feminized, with the traditional distinction between the roles of men and women being more diffuse. Women have a growing influence on all key consumption decisions, including tourism. And one also observes a process of feminization of holiday travel. Yeoman et al. (2010: 8-9) call it the "Bridget Jones effect": "*Thirtysomething single women trying to make sense of life and love*", independent, and with a medium-high income level.

Working patterns are also evolving. People want to work flexibly, and they will be less and less willing to sacrifice their personal life and family-related goals for the sake of their career. The distinction between work and leisure will blur, enabling greater flexibility in travel plans.

In short, the family vacation will still be one of the main drivers of change in global tourism, but the greatest growth will occur in holidays for pensioners and singles. As noted by Dwyer et al. (2009), success in attracting these segments will come from determining how they think, not just how they behave.

Another of the demographic motors of global change is a worldwide tendency towards urbanization. Already 50.5 per 100 of the Earth's inhabitants live in urban contexts, and the urban population is growing. Currently, there are 21 megacities (with more than 10 million inhabitants), representing 9 per 100 (324 million) of the world's urban population. It is expected that by 2025 the number of megacities will have reached 29, concentrating 10 percent of the world's urban population, and, by 2030, 60 per 100 of the population will be urban (United Nations, 2010). In this context, the management of large cities will be another significant problem.

From the perspective of tourism, this trend has two obvious consequences (Dwyer et al., 2009). On the one hand, one will have to satisfy the needs of the, mostly urban, tourists to vacation far from the crowds, looking during their trip to escape the congestion, noise, and stress of their daily lives. And on the other hand, as destinations large cities must generate an offer that is attractive enough to demonstrate to the tourist that they are really worth visiting over and above the problems that the urban agglomeration may cause.

Related also to the economic and political drivers of change, two major demographic trends have to be borne in mind. The first has to do with the evolution of pension systems in the principal developed countries. The baby boomer generation (born between 1943 and 1960)

will be retiring with a relative wealth guaranteed by a pension system with adequate funding. As a result, this generation will give rise to a significant volume of tourism flows. However, the changes on the horizon regarding the pension systems of countries such as Germany, Italy, Spain, and the U.K. will reshape the patterns of foreign travel, with a particularly rapid and significant drop in tourists from Japan and Germany. As noted by Yeoman et al. (2010), from 2050 onwards, pensioners will have less spending power than previous generations, and consequently also less propensity to travel.

The second question is related to migratory movements. In the last decade of the twentieth century, the more developed regions of the world received 2.7 million immigrants per annum (1.6 million with North America had as their final destination). The greatest volume of employment in the tourism industry has traditionally been generated in low-skilled, low-paying jobs, which have been taken up by young immigrant workers. To the extent that the average qualification level of young people in developed countries is becoming ever higher, the tourism industry will be unable to compete with other industries to attract this skilled workforce, and this will be further exacerbated if, as seems likely, there is increased control of immigration (Yeoman et al., 2010). The result will be a strong pressure on the costs of tourism firms in these countries, which will find themselves forced to reduce their capacity so as to adapt it to their real possibilities of competing in the markets.

3.6 New citizen and business values

The changes and trends discussed so far will condition in the future (indeed, in some cases they already are doing so) the forms of production and consumption, and hence the behaviour of businesses and individuals. Citizens have new values and needs, aspirations and expectations, that will shape the way they travel, and this in turn will influence the production process, market access, and even the behaviour of tourism firms and managers.

Particularly noteworthy is that more and more tourists are tailoring the planning of their vacations to meet their specific needs, beyond the mere fact of taking a few days of holiday break. A growing number of experienced travelers will seek experiences that are authentic and out of the usual, but not shared, and therefore will fall outside the mass organization formulas of combined tours. Moreover, customers are showing increasing interest in discovering, experiencing, participating, and learning in a more intimate way aspects of the daily life of the destinations they visit. Consequently, they are demanding more options, more interactivity, and products that are more personalized.

Indeed, this is one of the most interesting aspects of the so-called "Experience Economy". It enables the travel market to be fragmented into subsets of unique experiences, based on tailored holidays and a personalized service that allows the traveler to participate more actively in the experience. In developed countries in particular, clients are strongly attracted by the call of new experiences, and are willing to try new products, food, and places of interest, but also are too impatient to give a product or service that does not initially meet their expectations a second chance (Dwyer et al., 2009).

There are two aspects that stand out in consumers' new values which will be crucial when it comes to positioning a successful tourism product in the market. The first is that consumers are increasingly interested in their travel experience contributing to their personal growth, to improving themselves, with the emphasis being on health, welfare, education, the development of skills, and developing themselves culturally. This implies a trend worldwide towards choosing vacations in which they learn something. In sum, they see their holiday, not as a form of consumption, but as an investment in themselves.

The second is that customers, particularly those from developed countries, are increasingly socially and environmentally aware. This leads them to seek tourism experiences that they see as "authentic", including the demand that the services and/or products that they consume respond to codes of ethical production and marketing ("ethical consumerism"). This implies a willingness to purchase beyond the stimulus of price comparison, looking for the quality and opportunities that are coherent with their environmental and social concerns. And it also implies that consumers have a growing need to actively participate in a variety of tourism experiences which are in line with this militant attitude towards certain causes and beliefs.

In both cases, what one sees approaching on the horizon is a new tendency to mix holiday leisure with personal education and a proactive stance towards health or environmental and social causes. In the same vein, it also appears that the boundaries between work and retirement will also become increasingly blurred.

Together with this militant attitude goes a certain belligerency. Increasingly, prior to purchase, tourists are demanding guarantees that they will be paying for products, services, and practices that are safe. Therefore, given that the purchase will be conditioned by any perception of risk, tourism firms and destination managers need to take a twofold approach. On the one hand, they will have to promptly address any perception that markets have of risk, trying to counter any negative image that may have arisen. And on the other, they will have to implement actions necessary to minimize, and better to eliminate, any risks that indeed exist (Dwyer et al., 2009).

In our examination of the economic motors of change, we foresaw a significant shift in tourists' purchasing habits. In the coming years, this new culture of austerity in consumption will be maintained, with spending being less impulsive, more thoughtful, and better informed. There will clearly be an increase in Internet searches and comparative shopping, especially in regard to prices. But in no sense does this mean that consumers will simply be looking for the cheapest offer. Rather, they will continue to demand a quality experience, looking for the best price-to-quality ratio. They will elect not just any destination, but one that can guarantee the experience they are looking for. At the same time, they will keep their high expectations, so that their focus will be on "value for money" rather than on to the lowest priced offer.

It is also interesting to observe the response of travel firms and tourism managers to these changes in tastes, motivation, and attitudes of the demand, and to what degree they will also change their production and management processes to adapt to this new scenario. One might distinguish here between the large tour companies and the rest, bearing in mind that the vast majority of tourism-related businesses are SMEs, and that a characteristic of the tourism industry is its lack of sectoral articulation. This conditions the potential to generate the sufficient economies of scale to address many of these challenges, and affects the likelihood of the emergence of local firms capable of setting the standards for others in the destination to follow (Exceltur, 2010). One also notes the confusion of policy-makers (including destination managers) who are finding it very difficult to understand the changes in their environment and to act accordingly. Their attitude for now has mainly been one of a reactive response to events as they happen, without any real criterion underlying their decisions. This is clearly an untenable situation in that the effects of these events are far exceeding the capacity of too many destinations to ensure the continuation of their current planning and management frameworks.

Travel firms are, however, beginning to accept that they must take on a growing social and environmental co-responsibility, with greater real and practical interest in the destination. They realize that their business will be increasingly conditioned by the ability of all stakeholders to ensure the sustainable management of tourism destinations and the conservation of their unique characteristics (Cooper et al., 2008). Hence there is a growing concern of large firms to create departments that can effectively manage their Corporate Social Responsibility strategies, although, as pointed out by various United Nations reports (Jiménez, 2007), the concern has of now been for these strategies to improve the image of the company, and hence its immediate financial results, rather than contributing to reducing the real negative impact of the company's activities on the territory of the tourism destinations it operates in.

In the immediate future, tourism firms, including tour operators, will begin to understand the importance of working together with other members of the destination's value chain, creating business networks or alliances that will improve business efficiency and the effectiveness of their communication strategies (Cooper et al., 2008). This trend implies a shift away from the traditional management practices of individual sectors of the tourism industry - airlines, accommodation, intermediation, etc. - to a new concept of integrated management, in which the value chain of the entire trip will become increasingly more important (Oxford Economics, 2010).

The growing importance of non-Western cultures in the composition of outbound tourism worldwide has major consequences for the travel industry. A report by The Economist Intelligence Unit (2009) suggests that this new context will require changes in how customers are segmented. An 18-year-old from China may have more in common with an 18-year-old from the U.S. than either of them with a 40-year-old adult of their own country. More than 80 per 100 of that study's panel of experts agreed with this assessment, and most of them were totally in agreement.

For the supply side of the travel market to address all these changes will inevitably require a more highly skilled workforce. Increasingly, education will be a determinant of success for destinations and travel firms (Dwyer et al., 2009): the most successful will be the innovators, those who can count on highly trained personnel capable of keeping the offer in tune with changing customer needs. Likewise, the employees themselves will value their firm's organizational culture, especially if the firm devotes part of its personnel's working time to further training and learning. One aspect that will be particularly valued is the involvement of enterprises in the creation in the destination of social infrastructures that maximize the opportunities for individuals and businesses to innovate, learn, and in general develop the skills they need to access knowledge services.

While each of the motors of global change that we examined above is important in itself, they all influence each other to a greater or lesser extent, depending on the characteristics of the destination and the sector of the travel industry being analyzed. While most of them will be mutually reinforcing, in some cases they will work at cross purposes.

In sum, the present analysis has been aimed at providing the context for discussion on the future of the tourist industry. The various agents involved need to be proactive instead of reactive in their strategic responses, and to continually monitor and develop understanding of the factors driving change in their sector.

4. The paradigm of sustainability in the global tourism phenomenon

As is the case with "globalization", few concepts have been taken up into the global collective consciousness so quickly and so little questioned as "sustainable development", even though debate continues on its content and scope. Indeed, it is still used with different meanings, even sometimes with conflicting connotations (Pulido, 2006a). Since it was coined by the Brundtland Commission just over twenty years ago, it has become a recurring term in the political agenda of most governments and international organizations, as well as of a growing number of large and small firms and other social groups (Redclift, 2005). It has also given rise to countless international declarations (Rodríguez, 2007; Quental, Lourenço & Da Silva, 2011), scientific papers, projects, tools, and management models.

Experts agree that we are still far from the time when it will be possible to implement the changes that sustainability will require, especially if the current model of development is maintained. Consequently, the main causes of unsustainability remain, even if some of its symptoms have been dealt with (Bass, 2007). Neither does there seem to be acceptance of the real need for urgent, firm action in this issue, whether by government institutions, the business world, civilian society, or even at the individual level. All this is despite the ever more worrying warnings in successive reports of the International Panel on Climate Change, the Stern Report (2006), and the recognition of the significance of this challenge represented by the award of the Nobel Peace Prize 2007 (Prats, 2007).

The situation is no different in the field of tourism. As pointed out by Jiménez (2007: 78), tourism *"has clearly been slow relative to other productive industries when it comes to environmental considerations and accepting the principles of sustainability from a strategic standpoint."* Moreover, the concept of "sustainable tourism" itself has been subject to simplistic misinterpretations. Examples are its confusion with specific types of tourism such as eco-tourism or nature tourism, its denomination as "green tourism" or "ecological tourism", or, even worse, its coming to be regarded as a new alternative type of tourism⁵. In this sense, Lim & Cooper (2009: 90) recognize that: *"The concept of sustainable tourism has been the object of numerous definitions which have repeatedly been criticized as ambiguous, vague, sectoral, too conceptual, and prone to create confusion by linking it exclusively to environmental issues."*

Despite the controversy, at least in recent years, it seems that in the scientific literature (Cerina, Markandya & McAleer, 2011; Edgell, Allen, Smith & Swanson, 2008; Gössling, Hall & Weaver, 2009; Leslie, 2009; Lim & Cooper, 2009; Lu & Nepal, 2009; Sharpley, 2009; Miller & Twining-Ward, 2005), and in publications of international organizations, institutions, etc. in general, it is broadly accepted that the paradigm of sustainability in tourism is multidimensional. It is not simply a goal that has to be reached or a strategy *per se*, but, in the words of Novo (2006: 152): *"Sustainable development means seeing things in a completely different light (...) it of course means a radical transformation in the relationships between economics,*

⁵ Indeed, despite the progress of recent years made in the conceptualization of sustainable tourism, and UNWTO's own efforts in this direction, even today official publications as important as the strategic document prepared for the G-20 Summit held in the Republic of Korea in October 2010 inexplicably again fall into the same conceptual errors (Goldin, 2010: 46-47). One can thus understand why there is so much difficulty in specifying, within a spectrum of operational policies and actions, the content of the paradigm of sustainable tourism.

ecology, and ethics; it means starting to think and act with a different logic, taking into account the limits of the biosphere, social redistribution, and cultural diversity."

Consequently, progress towards sustainability requires profound changes in the current model of tourism development. One must expect a completely new setting for the relationships between the agents of tourism, the host society, the tourists themselves, and the resources that may be used, with these last being understood in a much broader sense than the traditional conception of their being exclusively associated with the idea of natural resources (Pulido, 2006a).

Indeed, one of the great mistakes that has been made since the concept was coined (although the Brundtland Report itself warned against it) has been to link it exclusively – at times even explicitly rejecting any other connection – with the environmental dimension. There has been discussion of "environmental sustainability", not understanding that achieving progress in sustainability requires an effort to be made to balance its three basic dimensions: efficient use of resources (economic dimension), intra- and inter-generational equity (social dimension), and maintenance and enhancement of the cultural and natural heritage (environmental dimension). And, as is already beginning to be recognized (Peris, Acebillo & Calabuig, 2010; Puhakka, Sarkki, Cottrell & Siikamäki, 2009; Pulido, 2006b), none of this is very likely to occur except in the context of a fourth dimension – the institutional.

One of the main challenges facing the current process of growth and globalization of tourism is its sustainability, which in recent years has generated an interesting debate about the approach that needs to be taken to the active sustainable management of tourism attractions and destinations. It is now accepted that the destination can not be a mere container for leisure practices and businesses – a simple backdrop against which tourism activities can be developed. Rather it has to be treated as a key substantial element of the entire process of production and consumption of tourism, and in particular as requiring proactive management (Cooper et al., 2008).

Tourism has traditionally been analyzed systemically, based on principles of stability, equilibrium, and predictability so as to be able to construct models in which any changes can be foreseen and therefore controlled. Under the assumptions of this approach, a tourism system functions like a machine in which stability, order, uniformity, and equilibrium are the norm – in a state which is seen as harmonious. Any change is seen as an unexpected perturbation to the system, something out of the ordinary to which a solution has to be found so as to restore everything to its natural state of equilibrium. Such systems have a linear behaviour, in which any change is predictable and can be foreseen and controlled with precision.

A quite different vision emerges from the scientific advances of this past decade concerning the concept of sustainability which have appeared in the fields of ecology, thermodynamics, ecological economics, and the so-called sciences of sustainability and of global change, among others. This sees tourism systems as being "*complex, adaptive, interdependent, and nonlinear*" (Farrell & Twining-Ward, 2004: 69). They are systems in which there is no one simple state of equilibrium, but different states of stability, instability, and even chaos. Moreover, various of these states may occur simultaneously. Consequently, management of these systems has to be flexible, adaptable, and experimental, in an ongoing process involving constant revisions and corrections (Page, 2009). There is thus a need for adaptive models of management that are based on accepting uncertainty as a working environment.

Through a process of social participation and learning, they will involve a progressive accumulation of the knowledge required to understand the changes that are occurring, and to react to them systematically, adapting, and indeed benefiting, from the new situation (Pulido, 2006a).

The challenge therefore lies in the implementation of new models of management of tourism destinations to ensure compliance with the, now widely accepted, principles of sustainability (GSTC, 2008; Sharpley, 2009).

5. Conclusions

This chapter has analyzed the growing importance of tourism as a global phenomenon. Despite the intense debate that has arisen in the last decade on tourism's role in a globalized world, the information that has been examined in this paper shows that, since the 1950s, both the production and the consumption of tourism have been characterized not only by a growth of flows and receipts, but also by their own steady process of globalization which now affects all the world's regions and most of its countries.

The data provided by UNWTO on future prospects confirm that the globalization of tourism will be even more marked in the coming years, since the greatest future growth rates are expected in regions of the world that currently have only minor shares of the market.

In this burgeoning process of globalization, tourism is facing a new scenario of global change that will condition all of its patterns of production and consumption. The impact will be very different depending on the type of destination and the sector of the industry concerned. It seems clear therefore that a key factor for success in the management of tourism destinations will be to identify and analyze these impacts, and to have the capacity to foresee the behaviour of many of the phenomena that affect the sector.

In this context, sustainability emerges as one of the great challenges for the development of tourism worldwide. With the expected horizon of continued growth and expansion into all regions and countries, tourism could well become in itself a serious global threat if it is not managed holistically and proactively. Principally, there is a need for new management models to cope with the conditions of stability, instability, and even chaos that every tourism destination may find itself subjected to.

It is urgent, therefore, that international agencies and institutions, governments, and the major multinational tourism companies commit themselves to leading this process of transition towards sustainability by adjusting their policies and actions to the now generally accepted principles of sustainable development. It will be important to avoid the mistake of the purely environmentalist orientation that has mostly been followed up till now. Its results have been at best sparse and incomplete, and the policies have generally been characterized by a proliferation of measures with considerable duplication, overlap, and unnecessary complexity.

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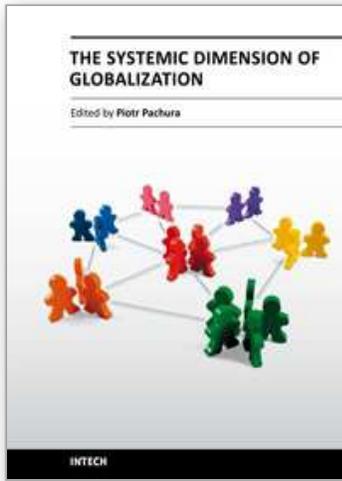
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