

# EVOLUTION OF TRENDS AFFECTING THE TOURISM INDUSTRY: BUSINESS CHALLENGES IN THE FUTURE

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Received 24.04.2024.  
Revised 27.05.2024.  
Accepted 17.06.2024.

Keywords:

*tourism, trends, tourism planning, sustainability.*

## ABSTRACT

*Tourism is a global industry that develops all over the world and whose economic and social phenomenon is reflected on the whole society; tourism is undoubtedly much more than a business system. At the same time, in this decade, the tourism industry faced the biggest crisis so far (the COVID-19 pandemic), which pointed to the need for the development of resilient and sustainable tourism. The paper investigates the trends that determined the development of tourism in this and the future period, the changes in the tourist market that were additionally initiated and intensified due to the pandemic, and that determined the trends present after the end of the pandemic period and restrictions on the traveling of tourists, too. The challenges that business stakeholders in tourism and the management of tourist destinations have to deal with in a highly competitive environment are explored: demographic trends, sustainability, digitization, accessibility.*

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## 1. INTRODUCTION

Tourism represents the world's growing global industry, which achieves significant economic impacts both at the level of individual countries (receptive destinations) and for the global world economy. As a highly competitive industry with a growing number of stakeholders competing on the market on the one hand, and a growing number of tourists who appear as consumers, it is of particular importance to analyze trends in tourism. In tourism, it is possible to monitor trends on the supply and demand side, and in the analysis of trends, it is possible to apply a quantitative and qualitative approach. The significance of tourism for the overall economic and social system has stimulated numerous studies of this phenomenon. (Correia & Kozak, 2021; Ianioglo & Rissanen, 2020)

The goal of the research is to identify changes in tourism trends in the last ten years and expected trends in the next period. For business entities and tourist destinations, understanding and responding to these

trends is a significant business challenge that affects competitiveness on the market.

## 2. ANALYSIS OF TOURISM TRENDS

Trend means the direction of development of a phenomenon in time (in relation to the previous state) or in relation to some other phenomenon or in relation to something (Hendija, 2013). It is expressed as a change of a certain economic variable as a function of time, where there may be short-term deviations from the development path (Galičić, 2014).

Quantitative analysis is based on the monitoring of statistical data. In order to objectively see the situation and perspectives on the tourism market, indicators and trends are presented in the period before the COVID-19 pandemic, then the impact of the COVID-19 pandemic on tourism, and recovery and trends on the tourism market after the pandemic.

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## **2.1 Characteristics of the tourist market until the pandemic year 2020**

Tourism is an important component of the global, but also of many national economies. Maintaining economic prosperity without negatively affecting the environment is a dilemma governments and industry face, which has grave consequences for individuals and communities. (Agarwal et al., 2024) It is a generator of economic growth, creates infrastructure and jobs, improves the standard of living and the quality of life of people. In 2019, the tourism sector generated 10.4% of world GDP (9.2 trillion USD), 10.6% of all jobs (334 million), of which 54% were women, was responsible for opening 1 of 4 of all new jobs in the world and employed a higher proportion of young people than in the total economy (World Travel & Tourism Council 2021).

According to data from the World Tourism Organization (World Tourism Organization 2019a, 2019b, 2019c), in 2019, the following trends were recorded on the global tourism market: (World Tourism Organization 2021: International Tourism Highlights).

- 2019 was a year of strong growth, although international arrivals grew below the exceptional rates seen in 2017 (+7%) and 2018 (+6%)
- 1.460 million international tourist arrivals and 1.481 billion USD in total revenues from international tourism were achieved.
- Tourism has experienced continuous expansion over time, despite occasional setbacks. Between 2009 and 2019, the growth of income from international tourism (54%) exceeded the growth of world GDP (44%).
- The value of total exports through international tourism reached USD 1.7 trillion.
- The highest growth in arrivals was achieved in the Middle East (8%), followed by Europe (4%), and Asia and the Pacific (4%).
- Europe accounted for 51% of the total number of international arrivals - followed by Asia and the Pacific (25%), America (15%), Africa (5%) and the Middle East (4%).
- Almost 40% of the income from international tourism was generated in Europe, followed by Asia and the Pacific with 30%.
- Of the total number of international arrivals, 40% were made in 10 world destinations, and 4 out of 5 tourists travel within their own region. The most visited countries were France, Spain, USA, China, Italy, Turkey, Mexico, Thailand, Germany and the United Kingdom.
- The most important emitting region was Europe with 48% of international arrivals. It is followed by Asia and the Pacific (26%), America (17%), Africa (3%), the Middle East (3%), and there is no data for 3% of arrivals.
- The main purpose of travel in all regions is leisure travel, except in the Middle East, where visiting friends and relatives, or travel for health or religious purposes, is predominant. The share of leisure travel increased from 50% in 2000 to 55% in 2019.

- The share of air traffic increased from 46% in 2000 to 59% in 2019, while land traffic decreased from 49% to 35% in the same period. In 2019, as many as 59% of trips were made by plane, 35% by road transport, 5% by water transport and 1% by rail.

It is clear that Europe was the most visited tourist region in the world with 744 million international tourist arrivals in 2019. USD 576 billion in revenue was realized. Compared to the previous year, the largest increase in tourist arrivals was achieved in Southern and Mediterranean Europe (5%), followed by Central and Eastern Europe (4%), and Western (2%) and Northern Europe (2%). (World Tourism Organization 2021: International Tourism Highlights).

The World Tourism Organization (UNWTO) has forecast a growth of international arrivals of 43 million annually in the period from 2010 to 2030 (World Tourism Organization 2011). International tourist arrivals are forecast to reach 1.8 billion by 2030, with the majority of new arrivals coming from Asia and the Pacific, with Northeast Asia being the most visited region in 2030. Furthermore, it is planned that arrivals for the purpose of spending free time, rest and recreation will grow at a rate of 3.3% per year, and arrivals for the purpose of visiting friends and relatives, for health or religious reasons, will grow by 3.5% per year, and arrivals for business reasons 3.1% per year. It is also predicted that by 2030, trips with the purpose of visiting relatives and friends, for religious and other purposes will represent 31% of all international arrivals, arrivals for spending free time, rest and recreation will represent 54%, and business and professional reasons will represent 15% (World Tourism Organization (2011).

Since these are long-term forecasts, the UNWTO published three alternative scenarios and accordingly corrected the projections of tourist traffic. However, none of the scenarios could have predicted the global health crisis that began in early 2020 and showed the sensitivity of the tourism sector to external influences.

## **2.2 The impact of the COVID-19 pandemic on tourism industry**

The multi-year growth trend of global tourist traffic came to an abrupt halt in 2020. The cause of the collapse of the tourism market was an infectious disease caused by the SARS-CoV-2 virus known as the coronavirus disease (COVID-19) (World Health Organization 2021a, 2021b, 2021c). The first recommendations for international travel were issued by the World Health Organization (WHO) on January 10, 2020 (World Health Organization 2021b), and on March 11, 2020, it made an assessment that the disease COVID-19 could be characterized as a pandemic (World Health Organization 2021a). This was followed by the introduction of travel restrictions to prevent the spread of the disease, which started in China. All countries of the world have introduced restrictions, and 27% of all destinations around the world have completely closed their borders to international tourism.

International tourism has returned to the level of thirty years ago. (World Tourism Organizations 2021a, 2021b) In 2020, a drop in international tourist arrivals at the global level was recorded by as much as 74% (that is, to 381 million arrivals, which is less than the level of 1990 when 400 million arrivals were achieved) and a loss of one billion tourist arrivals and more than USD 2 trillion of global GDP (World Tourism Organizations 2021a).

The pandemic has caused serious consequences for the global economy and tourism. In its 2021 annual report, the World Travel and Tourism Council (Wyman 2002, World Travel & Tourism Council 2021) listed numerous consequences of the crisis caused by the COVID-19 pandemic for the tourism sector in 2020. The following was established: (World Travel & Tourism Council 2021):

- As a result of restrictions on international mobility, the travel and tourism sector suffered losses of almost USD 4.5 trillion, and its global contribution to GDP fell by 49.1% compared to 2019, reaching only USD 4.7 trillion in 2020.
- The consumption of domestic visitors decreased by 45%, and due to travel restrictions, the consumption of international visitors dropped by as much as 69.4%. This led to the fact that the share of consumption by domestic visitors in total tourism consumption increased from 72% of total consumption in 2019 to 82% in 2020.
- In 2020, 62 million jobs were lost, leaving only 272 million employed in the entire sector globally. Particularly affected are small and medium-sized enterprises, which make up 80% of enterprises in the sector. Also, women, youth and minorities are disproportionately affected. There is still a threat of job losses if there is no support from governments.
- The sector's global contribution to world GDP decreased by 49.1% compared to 2019 and amounted to only 5.5%.
- Spending on leisure trips decreased by 49.4%, while spending on business trips fell by 61%.
- In Europe, a decrease in the share of the tourism sector in GDP was recorded by 51.4% in 2020. Domestic tourism consumption decreased by 48.4%, and international by 63.8%, which is less than 69.4% by how much international consumption at the global level fell. This is a consequence of intra-European travel, so Europe remains the leading region at the global level in terms of the number of international arrivals.

Most tourism experts at the end of 2020 and beginning of 2021 did not forecast that international tourism would return to pre-pandemic levels before 2023 (World Travel & Tourism Council 2021). The World Tourism Organization (UNWTO) developed recovery scenarios, according to which it predicted that it will take two and a half to four years for the tourism sector to recover and the number of international arrivals to reach the level of 2019.

The speed of recovery of tourist destinations affected by the crisis was related to resilience to crises. The resilience of local and regional tourism systems depends

on various factors, such as: (European Commission, 2021).

- Diversification of tourist products and target groups. Resilience is contributed by a variety of tourism offers according to the specific purpose of travel (e.g. leisure, work or health) and type of activity or product (e.g. sun/beach, winter/skiing, active/mountainous, natural/rural, urban/culture/heritage, shopping, MICE or gastrotourism).
  - Good destination management. The cooperation of different stakeholders, pooling of forces and resources with the aim of overcoming the crisis is suggested.
  - Openness and innovation. The ability to adapt to changing circumstances depends on readiness and openness to change and experimentation. Adaptable, open and innovative destinations can adapt to changing circumstances more easily than those that stick to 'old habits'.
  - Access to financing and resources. Implementing changes or surviving a crisis also depends on access to financial resources.
- Tourist destinations that respect the aforementioned knowledge recover faster from the crisis and become more resistant to possible crises in the future. However, the pandemic has triggered certain trends that are expected to be present in the short or medium term. The World Travel and Tourism Council (WTTC) has identified four trends that enable the overcoming of the crisis and the recovery of the travel and tourism sector that will be present in the post-pandemic period: (World Travel & Tourism Council 2021).
- Change in demand - From a demand perspective, COVID-19 is changing travelers' preferences and behaviors towards familiar and predictable, or low-risk travel. In the short term, domestic and regional travel, more detailed travel planning, and spending time outdoors will dominate. Proactive and transparent communication and close cooperation between companies and partners in the value chain will be key to driving demand.
  - Health and hygiene - Health and safety will come first. Personal experiences, advice from experts, concerns about physical distancing will guide the behavior of tourists in the short and medium term. It is important to gain trust and achieve transparent communication between travelers and tourism employees. Businesses will need to work together to implement safe travel protocols.
  - Innovations and digitalization - COVID-19 has encouraged the implementation of innovations and new technologies in tourism. Consumers are also rapidly adopting new technologies.
  - Sustainability - Public awareness of the environment and advocacy for the protection of wild animals and ocean conservation has increased. Stronger control of environmental protection in the business system, supporting diversity and inclusiveness. Given the high proportion of women, minorities and young people compared to other sectors, tourism has a unique

opportunity to protect vulnerable groups and work to reduce poverty and inequality.

Based on the above, it can be concluded that the pandemic caused important changes in the entire economic system, including tourism. New trends have been launched that will transform the tourism sector. Some of them are short-term or medium-term, while for some phenomena it can be stated that they have been strengthened and will significantly transform tourism in the long term. The long period of the pandemic resulted in long-term changes both on the side of tourist supply and on the side of tourist demand, that is, on the overall tourist market and all its elements.

Following a strong 2023, international tourism is well on track to return to pre-pandemic levels in 2024. According to the first UNWTO World Tourism Barometer of the year, international tourism ended 2023 at 88% of pre-pandemic levels, with an estimated 1.3 billion international arrivals. The unleashing of remaining pent-up demand, increased air connectivity, and a stronger recovery of Asian markets and destinations, are expected to underpin a full recovery by the end of 2024. International tourism is expected to fully recover pre-pandemic levels in 2024, with initial estimates pointing to 2% growth above 2019 levels. This central forecast by UNWTO remains subject to the pace of recovery in Asia and to the evolution of existing economic and geopolitical downside risks. (<https://www.unwto.org/news/international-tourism-to-reach-pre-pandemic-levels-in-2024>)

### **3. OTHER DETERMINANTS OF TRENDS IN TOURISM INDUSTRY**

In addition to the trends triggered by the coronavirus pandemic, some of which are short-term or medium-term, tourism is affected by other causes, and long-term trends are evident, some of which are independent of the pandemic, while others are strengthened during the pandemic. In this part, the focus is on long-term trends, that is, megatrends that will affect different areas of people's lives and work over the course of 10-15 years and reflect on a whole range of activities in different sectors. These trends are caused by changes in the environment of the tourism system. They change people's behavior patterns and business activities in the long term. The most important causes of long-term trends in the global tourism market are related to changes in the demographic and technological environment, as well as climate change and excessive tourism, which are the catalyst for the long-term trend of sustainable tourism development. The following is a presentation of the most important comprehensive trends in the global tourism market that have far-reaching effects.

#### **3.1 Demographic changes**

The number and structure of the population are important factors in the development of tourism supply and demand. On the one hand, they determine the size

and structure of tourist demand, and on the other hand, they can be a limiting or stimulating factor in the development of the tourist offer. Demographic changes are of a long-term nature, so the results of demographic policy are visible for ten or more years. Therefore, when developing tourism development strategies, demographic changes should be taken into account and tourism products developed that will meet people's future needs.

Several trends are evident in the demographic environment that will have major consequences for tourism globally. The most important long-term trends are population growth, changes in the demographic structure of the population, migration and urbanization.

At the global level, the trend of population growth is visible. According to United Nations data, the world had 7.7 billion inhabitants in 2019 (United Nations 2018, 2020). It is expected that by 2030, the number of inhabitants will grow by 10%, and by 2050 by 26%, when it will amount to 9, 7 billion inhabitants. At the same time, the largest increase will occur in Africa, while population growth in Europe and North America will amount to only 2% until 2050 (United Nations 2018, 2020). In some countries, it is a clear conclusion that changes in the number of inhabitants will reflect on economic growth and development, and that, in addition to tourist demand, they will also significantly affect the labor market. This can be a significant limiting factor for the development of tourism in countries that are facing population decline and emigration.

Population migration is also related to the trend of urbanization. United Nations projections show that the number of people living in urban areas will increase from the current 55% to 68% by 2050 (United Nations 2018). Population migration from rural to urban areas and population growth may increase the number of people in urban areas to 2.5 billion by 2050, with almost 90% of this increase occurring in Asia and Africa (United Nations 2018, 2020).

The trends of population growth, migration and urbanization will be reflected on the tourism market in such a way that on a global level tourist traffic will grow in the east and south of the Earth, i.e. an increase in outbound trips from Africa, the Middle East and Asia is expected (World Travel & Tourism Council 2019). However, urbanization can also manifest itself in the form of excessive tourism, which has a negative effect on the sustainability of destination tourism and impairs the quality of life of residents.

The trend of population aging results in changes in generational groups. According to data from the United Nations (United Nations 2020), in 2020 there were around 727 million people aged 65 or over in the world. It is expected that this number will more than double by 2050 and reach over 1.5 billion people, i.e. that the share of elderly people in the global population will increase from 9.3 percent in 2020 to 16.0 percent in 2050, and that by the middle of the century, every sixth person in the world will be 65 or older (United Nations 2019, United Nations 2020).

Demographic changes, including population aging and migration, are reflected in the number of members of generational groups. As younger generations enter the labor market, there will be long-term changes in lifestyle and travel. Changes are already visible today. Since each generation has certain characteristics of

behavior on the tourist market, it is important to highlight the most important characteristics of generational groups, from the aspect of tourist demand. Table 1 shows the characteristics of the generations that participate in the tourist market today.

**Table 1.** Generational groups and travel characteristics

GENERATION GROUP	YEAR OF BIRTH*	TRAVEL CHARACTERISTICS
<b>BABY BOOM - GENERATION</b>	1946. – 1964.	<ul style="list-style-type: none"> <li>• Tourists over the age of 65 made almost 1 out of 4 tourist overnight stays for private purposes that EU residents made in 2019, and they go on longer trips, preferably to their country of residence. (Eurostat, 2021)</li> <li>• Their main motives for traveling are relaxation and rest.</li> <li>• They are looking for outdoor experiences (hiking, camping, visiting historical and scenic attractions, etc.).</li> <li>• They are slow to accept changes and often travel with their families (Nordin, 2005).</li> <li>• They are experienced, demanding, act rationally, look for a lot of information about the offered product and have enough time to check the obtained data, and the time spent in making a purchase decision is longer compared to young travelers. (Śniadek, 2006)</li> <li>• Older travelers stay longer at their destination, spend more time planning and visit friends and relatives more often. (Horneman et al., 2002)</li> </ul>
<b>GENERATION X</b>	1965. – 1980.	<ul style="list-style-type: none"> <li>• Members of Generation X like to spend money on new experiences that will enrich their lives, such as travel and vacations.</li> <li>• Value for money is important to them.</li> <li>• Collect information and book accommodation via the Internet.</li> <li>• They often travel with family members. (Nordic, 2005)</li> </ul>
<b>GENERATION Y (MILLENNIALS)</b>	1981. – 1996.	<ul style="list-style-type: none"> <li>• The largest generational group, comprising 31.5% of the population of 7.7 billion people, which makes it an attractive tourist market. (The Wanderling, 2021)</li> <li>• They are active in travel planning and seek information from different sources.</li> <li>• They prefer to explore international locations rather than domestic destinations.</li> <li>• They look for a wide range of tourist experiences, are open to communication and respond quickly to internet advertising (Kim et al., 2015).</li> <li>• They often book online.</li> <li>• If they travel for business, they want to extend their business trips in order to spend additional time with friends and family.</li> <li>• Millennials are digital nomads, looking for authentic experiences and activity-based travel, such as cultural/educational, culinary, volunteer and adventure tourism. (eHotelier, 2019)</li> <li>• They are influenced by technology, they expect speed and efficiency in their travels,</li> <li>• They are not afraid to try new products and use new booking methods.</li> <li>• They are used to sharing their life activities and opinions with friends through social media.</li> <li>• They consistently check reviews before booking.</li> <li>• They like to travel with friends, they look for interaction and socialization.</li> <li>• They stay in hostels, but they also look for additional facilities and authentic experiences of local culture.</li> <li>• They promote social responsibility. (Lee, 2013)</li> </ul>
<b>GENERATION Z</b>	1997. – 2012.	<ul style="list-style-type: none"> <li>• Generation Z grew up in an environment permeated with information and communication technology and can be defined as a hyper-connected generation. (Haddouche &amp; Salomone, 2018)</li> <li>• Participates in various free activities; have a desire for social interaction, participation and co-creation of experiences that can also take place in the virtual world. (Skinner et al., 2018)</li> <li>• According to research by the European Travel Commission, generation Z is characterized by the following characteristics: (Dimock 2019)</li> <li>• She grew up in an era of developed awareness of human behavior, personal health, technology and the impact of humanity on the environment,</li> <li>• Issues such as globalization, financial crisis, terrorism, climate change and technology have played a strong role in shaping the attitudes and beliefs of generation Z, and thus their travel behavior,</li> <li>• Have a sense of responsibility towards the global community and the environment,</li> <li>• Have high expectations for affordable, seamless connectivity at home and on the go</li> <li>• They are aware of the importance of physical and mental health.</li> <li>• Members of that generation have entered the labor market and it is to be expected that they will represent a significant tourism segment in the future.</li> </ul>

Source: (Dimock 2019)

Changes related to the number and structure of the population are influencing the tourist market. Due to changes in the household structure, i.e. the increasing number of single households, an increase in the number of independent (solo) and multi-generational trips has been observed at the global level. (World Tourism Organisation 2019) In 2019, independent trips accounted for 11% of the tourism market, where women are represented by 84% (Solo Travel Statistics, 2020 - 2021).

### **3.2 Sustainability**

Tourism is very sensitive to various crisis situations that occur in the environment where tourist activities take place. Global climate change is of great concern and interest to experts, scientists and the general population. A survey conducted in 2020 showed that 37% of more than 20 thousand respondents believe that climate change is the most worrying environmental issue facing the world. (Statista, Environmental pollution worldwide, 2021)

There is an interaction between tourism and climate change. On the one hand, climate is an important factor in the development of tourism and the attractiveness of a tourist destination. Therefore, stakeholders in tourism are aware of the importance of the preserved environment and climate for the long-term development of tourism. However, although tourism is sensitive to climate change, it also has a significant negative effect on the climate and the environment, since it contributes to the emission of greenhouse gases that cause global warming. Tourism is responsible for about 8% of total CO<sub>2</sub> emissions (Lenzen et al., 2018). The biggest generator of carbon emissions is traffic. It was found that in 2016, tourism-related traffic caused five percent of global carbon emissions, and it is predicted that CO<sub>2</sub> emissions from tourism-related traffic will increase to represent 5.3 percent of all human-caused emissions in the world in 2030. (Statista, Share of carbon dioxide emissions coming from tourism-related transport worldwide in 2016, with a forecast for 2030)

Starting from the fact that tourism represents the backbone of the development of many economies in the world, it is necessary to invest efforts to minimize the negative effects of tourism on the environment, in order to preserve resources for the development of tourism, as well as the quality of life of future generations.

The state of the environment is also negatively affected by overtourism, which presents a challenge to the management of tourist destinations. It is the result of urbanization, economic development, lower transportation costs, easier travel and a growing middle class in advanced and developing economies, which has turned cities into increasingly popular travel destinations. (World Tourism Organization and United Nations Development Programme 2017)

As a response to the challenges arising from human action on the environment, including tourism, the paradigm of sustainable tourism development is emerging. The sustainable development of tourism is

not a new trend, but it has not lost its importance over time. Moreover, the conclusion of the UNWTO/PATA forum on tourism trends held in 2018 is that sustainability is the core of tourism development until 2030 (World Tourism Organization 2019).

The United Nations Environment Program (UNEP) and the World Tourism Organization (UNWTO) define sustainable tourism as tourism that optimally uses environmental resources that are a key element of tourism development, maintaining essential ecological processes and helping to protect natural heritage and biodiversity, respects the socio-cultural authenticity of the destination, preserves its built and living cultural heritage and traditional values, and contributes to intercultural understanding and tolerance and ensures that economic activities are sustainable and long-term, and that they bring social and economic benefit to all stakeholders with fair distribution, among other things stability of employment, opportunities to earn social services to the community, helping to eliminate poverty. (United Nation Environment Programme (UNEP) & World Tourism Organizations (UNWTO) 2005).

In the document "Making tourism more sustainable: a guide for policymakers", UNEP and UNWTO point out that "the guidelines for sustainable tourism development and management practices are applicable to all forms of tourism in all types of destinations, including mass tourism and various segments of niche tourism". Furthermore, "the principles of sustainability refer to the ecological, economic and socio-cultural aspects of tourism development, and between these three dimensions, an appropriate balance must be established in order to guarantee its long-term sustainability". Not least, it should be pointed out that "sustainable tourism should also maintain a high level of tourist satisfaction and provide a meaningful experience to tourists, raising their awareness of sustainability issues and promoting sustainable tourism practices among them." (United Nation Environment Programme (UNEP) & World Tourism Organizations (UNWTO) 2005).

In 2005, the United Nations Environment Program (UNEP) of the World Tourism Organization (UNWTO) highlighted the goals of sustainable tourism development. (United Nation Environment Programme (UNEP) & World Tourism Organizations (UNWTO) 2005). However, the challenge of the sustainable development paradigm is not the adoption of goals and strategies, but the implementation of sustainable development principles in practice, both in the public and private sectors. Therefore, the UNWTO has developed the Statistical Framework for Measuring the Sustainability of Tourism and monitors progress in achieving the goals of sustainable development. Thus, the World Tourism Organization (UNWTO) and UNDP in their document "Tourism and Sustainable Development Goals - Road to 2030, Highlights" reveal that the public and private sectors fully recognize the potential contribution of tourism to the goals of sustainable development, and that countries as well as companies can encourage true progress in the

development of tourism to make it greener, fairer and more inclusive. (World Tourism Organization 2019a). Their research on the integration of sustainable patterns of consumption and production into tourism policies published in 2019 showed that sustainability is a key part of tourism policies in all countries which were included in the research. (World Tourism Organization 2019c)

Sustainable tourism is also a strategic priority of the European Union. In 2007, the European Commission adopted the "Agenda for Sustainable and Competitive European Tourism" (European Commission 2007), the starting point of which are the challenges of sustainable tourism, which include: preservation of natural and cultural resources; limiting negative impacts on tourist destinations, including the use of natural resources and waste production; promoting the well-being of the local community; reduction of seasonal demand; limiting the impact of tourism on the environment; make tourism accessible to everyone; improving the quality of tourism business. Furthermore, in March 2021, the Resolution of the European Parliament on the establishment of a European Union strategy for sustainable tourism was accepted, which should enable: revival of the sector thanks to plans to respond to the COVID-19 pandemic; (2) redirection of management policies within the framework of the Union, (3) transition to sustainable, responsible and smart tourism, (4) planning the future of the tourism sector. (European Parliament, 2021) It is clear that the sustainable development of tourism is not a temporary trend, but will be the dominant paradigm of tourism development in the coming period as well.

### **3.3 Accessibility**

In addition to being sustainable, tourism today should be socially responsible and accessible to everyone. Accessible tourism enables people with specific access requirements (respecting mobility, vision, hearing and cognitive dimensions of access) to function independently, fairly and with dignity through the delivery of universally designed tourism products, services and environments. This includes all people, including those traveling with children in prams, people with disabilities and the elderly. (Darcy & Dickson, 2009)

To illustrate, the size of the market for people with disabilities is evidenced by the following data (World Tourism Organization 2020):

- 1 billion people live with some form of disability (15% of the world's population).
- By 2050, 1 in 6 people will be over 65, and in Europe and North America 1 in 4 people living in Europe could be 65 or older.
- More than 46% of elderly people (over 60) already have a disability.
- Passengers with disabilities usually travel accompanied by 2 to 3 people.
- The potential market of people with disabilities in the European Union is more than 80 million people (130

million if the elderly and accompanying persons are added).

- 70% of people with disabilities in the European Union have the financial and physical means to travel.

Accessibility does not only apply to people with disabilities, but to all people who, regardless of their life circumstances (for example, families with small children, young students, elderly people), have the right to access tourist experiences. Therefore, tourism should be accessible to everyone, both people with special needs and people living in specific circumstances. The right to tourism for all people is highlighted in the Global Code of Ethics for Tourism (World Tourism Organization 2001) which promotes responsible, sustainable and accessible tourism for providing services and managing accessible tourism. The goal is to encourage key stakeholders in the tourism sector to implement measures that will result in greater participation of different groups of people in the tourism industry, including people with disabilities. (World Tourism Organization 2020) Tourist destinations that implement these measures, will develop a tourist offer that will improve the tourist experience, but at the same time improve the quality of life of its residents. Such tourism that integrates the concepts of sustainable tourism, accessible and social tourism can be reduced to the umbrella term Tourism for all (World Tourism Organization 2016). It can be concluded that the megatrend of sustainable, socially responsible, inclusive and accessible tourism will be the fundamental paradigm of tourism development in the period to come.

### **3.4 Digitalization**

The development of information and communication technology has significantly influenced all spheres of society and business processes. Digital tourism is a combination of economy, tourism and computer information technology and is a comprehensive science and technology. (Wider et al, 2023) Tourism is one of the first sectors to digitize business processes on a global scale (World Tourism Organization 2021a). Numerous technological solutions have been developed that promote digital transformation in tourism and impose new trends. The main technological trends applicable in tourism are (World Tourism Organization 2020):

- Voice search and voice control - Enables travelers to search by voice when finding and booking airline tickets, hotel rooms and various travel experiences. It can be used to control lighting and heating in hotel rooms, to get tourist information without having to talk to a staff member.
- Robotics - The use of robots in hotels, restaurants, airports or travel agencies reduces contact between people, replaces human labor, shortens waiting time for service and provides a number of other benefits.
- Contactless payment – Enables faster payment processing, improves user experience by saving time, and during the COVID-19 pandemic protects staff, while passengers feel safer.

- Artificial Intelligence (AI) - Artificial intelligence continuously learns from interactions with customers. It is used for data processing and customer support needs, and to improve the customer experience.
- Virtual Reality (VR) - Provides travelers with the opportunity to experience remote locations from the comfort of their own home. Using VR, users can experience virtual tours of hotels and restaurants, sights, national parks or other activities.
- Augmented Reality (AR) – The technology allows augmenting the real environment with additional content, and improves the user experience, providing users with information about local destinations or entertainment.
- Chatbots with artificial intelligence - provide clients with quick answers to questions 24 hours a day. 7 days a week, regardless of staff availability.
- Internet of Things (IoT) - It involves the Internet interconnection of devices for everyday use, enabling the sending and receiving of data.
- Recognition technology - Includes fingerprint recognition, facial recognition, retina scanning and other biometric identifiers.
- Big data (big data) - Used for business analysis, for revenue management needs, forecasting the level of demand, optimization of prices and promotional strategies, and for personalizing the tourist offer.
- Cyber security measures – In order to improve cyber security, it is necessary to follow regulations and invest in hardware and software.

The most important impacts of digitization on the tourism sector are visible in the area of the emergence of smart solutions that facilitate travel, the development of smart destinations and new job profiles. A comprehensive smart travel model includes the application of measures that improve and facilitate travel and improve security, such as the application of smart visas, security processes and infrastructure based on innovative technologies (Nordin 2005).

The application of innovative technological solutions and digital transformation change the way tourist destinations and business entities in tourism are managed, and enable the development of smart destinations. A smart tourist destination implies a dynamic interconnection of stakeholders through a technological platform where information related to tourist activities can be immediately exchanged. (Buhalis & Amaranggana, 2014) That integrated platform has multiple touch points that can be accessed through various end-user devices that will support the creation and facilitation of real-time tourism experiences and improve the efficiency of tourism resource management across the destination at both the micro and macro levels. The ultimate goal is to use the system to improve the tourist experience and improve the efficiency of resource management to maximize destination competitiveness and consumer satisfaction, while also demonstrating sustainability over a longer period. (Buhalis & Amaranggana, 2014)

It is expected that the greatest impact of digital transformation in tourism will be visible in the impact on the workforce in the tourism industry. Managing smart destinations will require new skills necessary to implement smart initiatives. Although the introduction of automation will change the nature of some jobs in tourism, and some will be completely eradicated, new employment opportunities will be generated, and micro, small and medium enterprises will have the opportunity to grow (World Tourism Organization 2021a) That is why it is necessary encourage education in the field of innovative technologies that will enable the implementation of digital solutions in business processes and the management of smart tourist destinations.

#### **4 IMPLICATIONS OF THE IDENTIFIED TRENDS**

Trends in the global tourism market open up new opportunities for the development of innovative tourism offers. It is clear that tourist destinations and business entities that are adaptable to changes, implement new technologies and quickly respond to market demands will be more resistant to other potential crises in the future and strengthen their competitive advantage.

The World Travel and Tourism Council (WT&TC) has identified five interconnected transformative megatrends that will represent long-term opportunities for those entities in the tourism market that can adapt to changes (World Travel & Tourism Council 2019):

- "Augmented reality" is a trend based on the integration of innovation and modern technology into everyday life. Holders of tourist offers have the opportunity to create unique trips and offer visitors personalized experiences. It will be necessary to differentiate the offer for special market segments and provide tourists with the opportunity to experience authentic experiences, new cultures and connect with communities.
- The trend called "Restructured life" is based on the fact that the traditional boundaries between work and free time are disappearing. The economy of part-time jobs (the so-called gig economy) and the sharing economy are redefining relationships and creating new expectations in the area of life and work. Destinations and business entities will have to adapt the offer to the lifestyle of travelers, enable them to connect and immerse themselves in new cultures.
- "Revolutionized data" is a trend based on technological innovations, such as the Internet of Things (IoT) and machine learning. It will be necessary to better understand tourist behavior and create a seamless travel experience using the Internet of Things (IoT) and biometric solutions. User experiences need to be enriched by the implementation of technology, for example systems for voice recognition and natural language processing, the use of chatbots in airports or the use of virtual reality before purchase. It is important to give consumers control in order to reduce concerns



about how technology is used and personal information is shared.

- The "Distributed Power" trend, taking into account urbanization and the growth of the Asian middle class, which results in a change in power dynamics and the emergence of new centers of influence in the East and South of the Earth. It will be necessary to monitor demographic changes and plan presence in new markets. Also, it is necessary to understand the needs of new generations and offer personalized experiences, quality and superior services. At the same time, it is necessary to take into account the pressure on destinations and resources, and proactively manage destinations.

- "Reimagined consumption" is the name of a trend that takes into account consumer awareness of the increase in environmental risks. A more ethical and efficient use of resources and a change in lifestyle are required. It is necessary to take care of preserving the destinations, protecting the environment and the health of the community.

Taking into account all the above, it can be concluded that tourism in the future should be sustainable, environmentally friendly, responsible, authentic and accessible to all people. It is expected that the creators of tourism policies and the holders of the offer in tourism accept the digitization of business, be innovative and creative, to implement the principles of

ethics and social responsibility in their actions with the ultimate goal of sustainable development of tourism and improvement of people's quality of life.

## 5. CONCLUSION

The development of tourism in a certain tourist destination depends on numerous factors and phenomena. Observing the direction of development of these phenomena is necessary for effective planning of future development. Tourism is an important sector of the global and many national economies. It is a generator of economic growth, creates infrastructure and jobs, and improves the standard of living and the quality of life of people. For the effective and successful tourism planning and development of tourism, it is necessary to understand the trends that appear within the tourism industry and in the environment.

The aforementioned trends affect the operations of all business entities in tourism, public administration and management of tourist destinations, and it is especially important for the sustainability of tourism to monitor how these trends affect the local community, since sustainable tourism means tourism aligned with the interests of the local community and the expectations of the local population.

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