



# **Whither Mass Tourism?: Some thoughts on Future Patterns and Developments**

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# APPROACHES

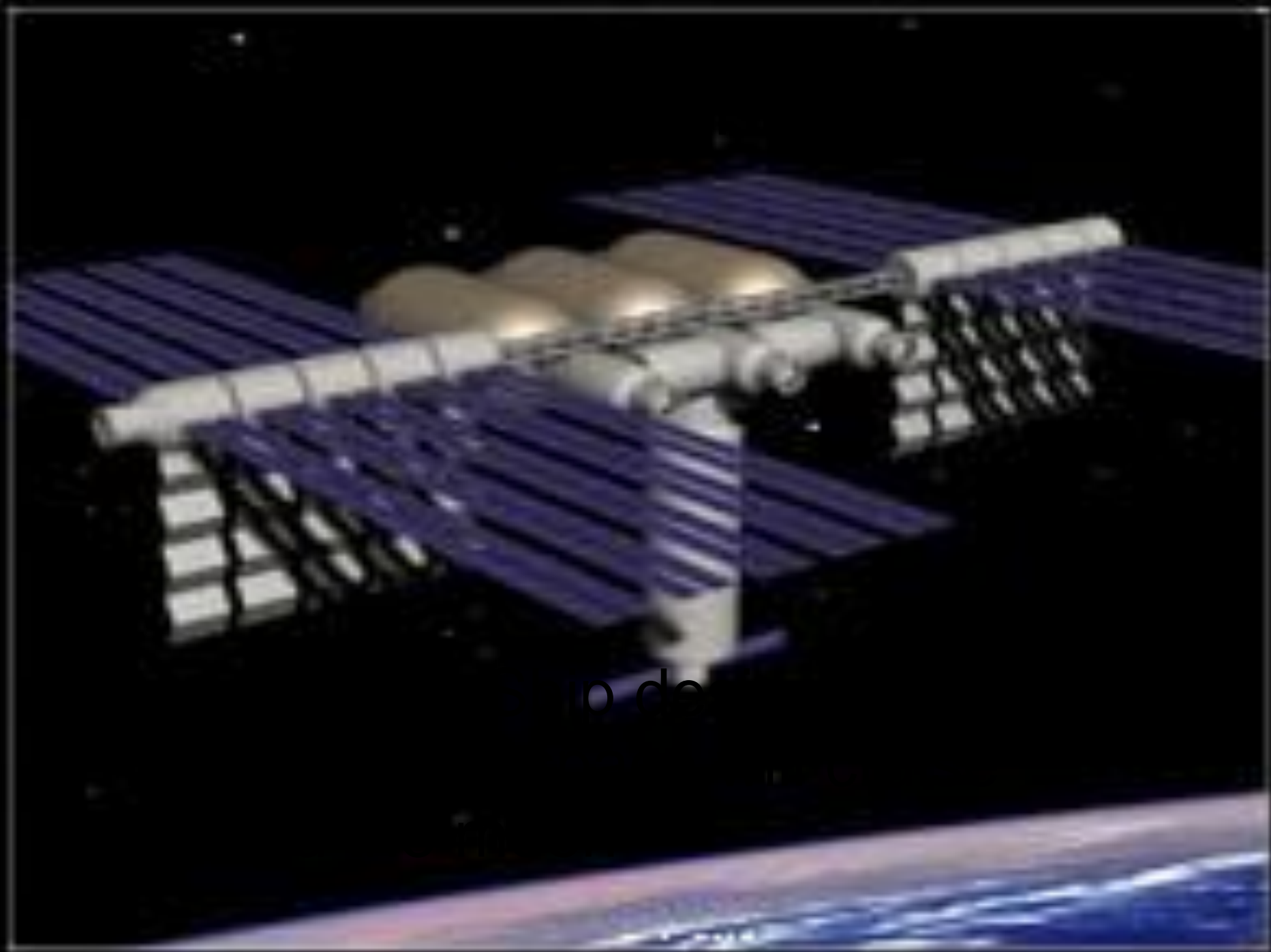
There are three basic ways of identifying future patterns:

Statistical manipulation e.g. econometric forecasting;

By fantasising over scenarios;

By looking backwards, sideways, forwards, and guessing.

I am not a statistician nor a fantasist,  
so.....





This hotel is being developed by Space Island



# Inside the Space Tourism Ring







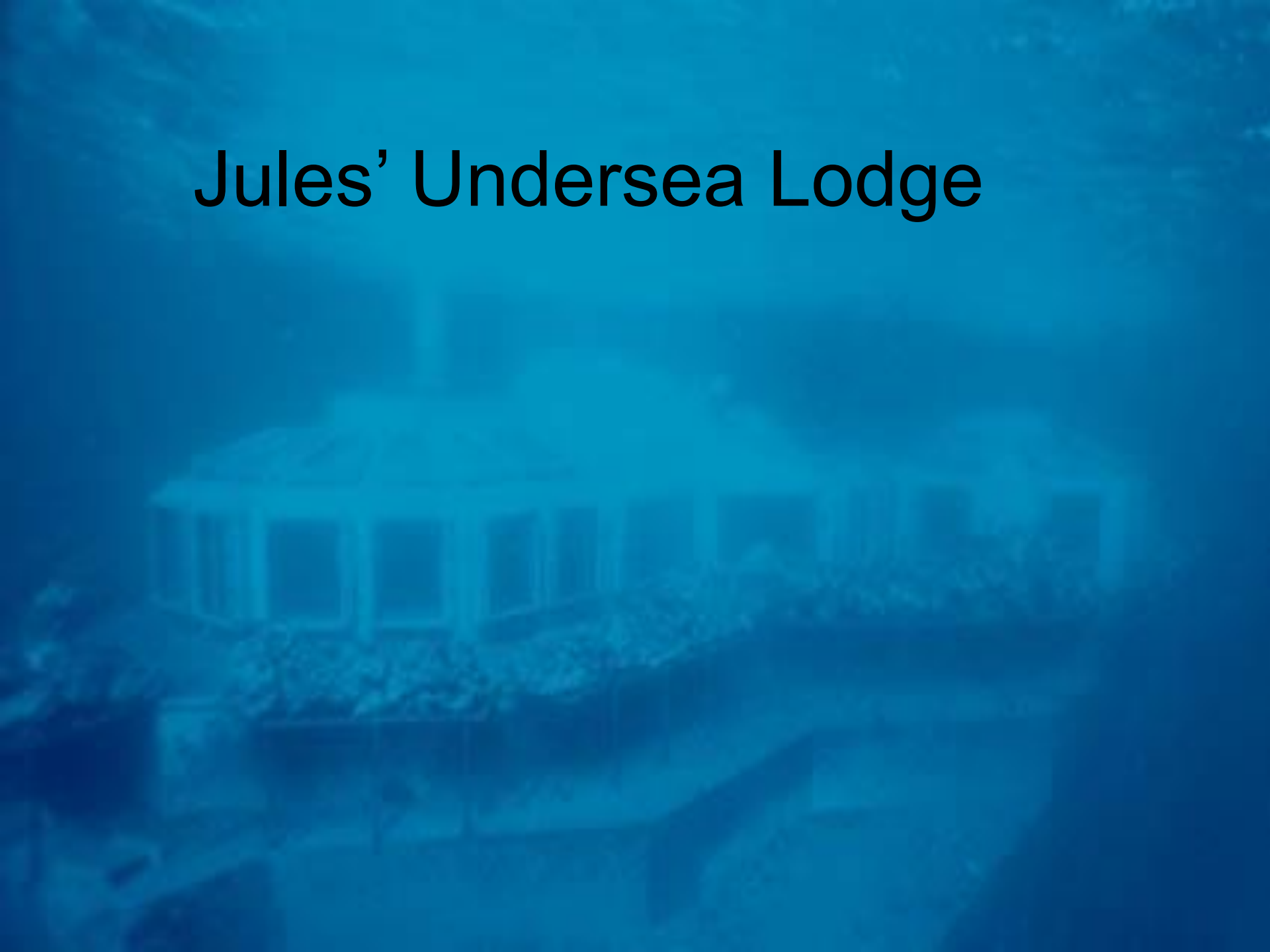








# Jules' Undersea Lodge









# Suborbital Flight





# SpaceShipOne



**Is this the beginning of the age of affordable Space Tourism?**



## **Three basic assumptions:**

There is not much that is new in tourism

Tourism is very place specific.

We need to understand where we have come from and how we have got to where we are if we are to understand where we might be going in the future.





“It is common for authors to stress the recency of mass tourism, the volatile nature of tourism patterns, and the lack of precedents for current or future tourism phenomena. One reason for this is that few authors have placed their studies in an historical context”.

Wall, in Hall and Lew 1997



# **The history of forecasting in areas such as social change is not good.**

RCA head said television would not be a medium of entertainment (1955)

Original market for computers was thought to be five (IBM 1943)

Heavier than air flying machines impossible 1895.

No future in talking pictures (Warner, 1929).

Einstein saw no indication of nuclear energy 1932

Guitar bands (Beatles) on the way out, 1963



# Tourism Dynamics

There is a major paradox in tourism:

Great Inertia  
**and**  
Great Dynamism





# **INERTIA exists because of :**

Habits;

Tastes ;

Preference for Constancy;

Investment (personal, corporate,  
public)



# **DYNAMISM occurs because of:**

Attitudes (corporate, media,  
individual);

Technology;

Economics;

Politics



# **Issues of Tourism Dynamics:**

Change is normally one way  
(development)

Change is often irreversible (or appears  
to be)

Change is often gradual and cumulative

Change is often unintended

Change is often unanticipated





# Rate of change

This often appears to be faster than in previous periods. There is now significant change occurring within one generation, especially in technology and its applications.



# Changes over the last 40 years

Transportation, new generations of planes.  
Personally organised package mass tourism.  
Propensity for mass tourists to travel abroad.  
Propensity of mass tourists to seek the sun  
Political changes in markets and destinations  
Evolution of IT/WWW/social media  
Greater awareness of tourism.



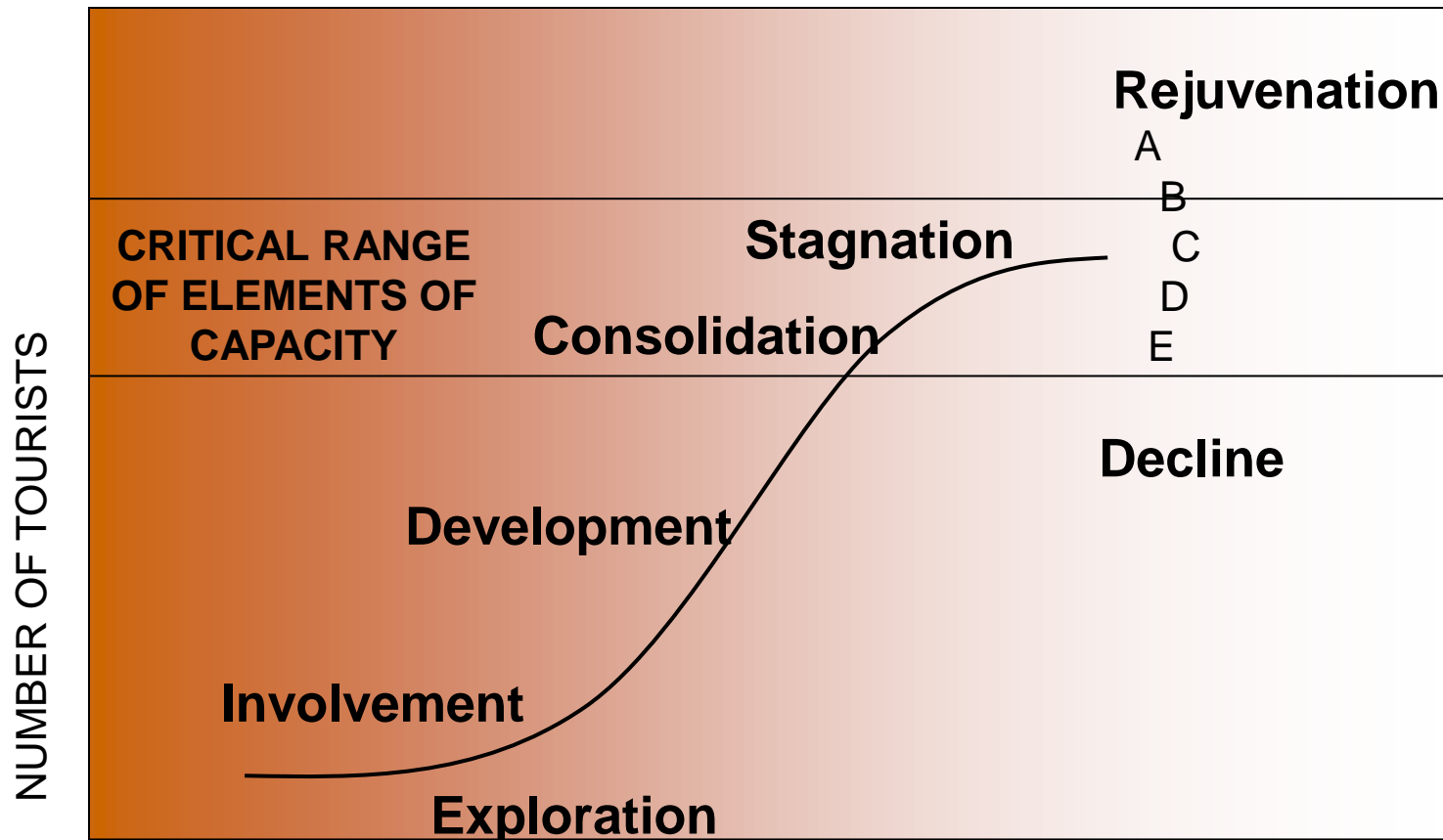
# TYPES OF CHANGE:

**Evolutionary:** gradual, consistent, building on existing structures, predictable, often endogenous forces.

**Revolutionary:** sudden, variable, often destroying existing structures/features, unpredictable, often exogenous forces.



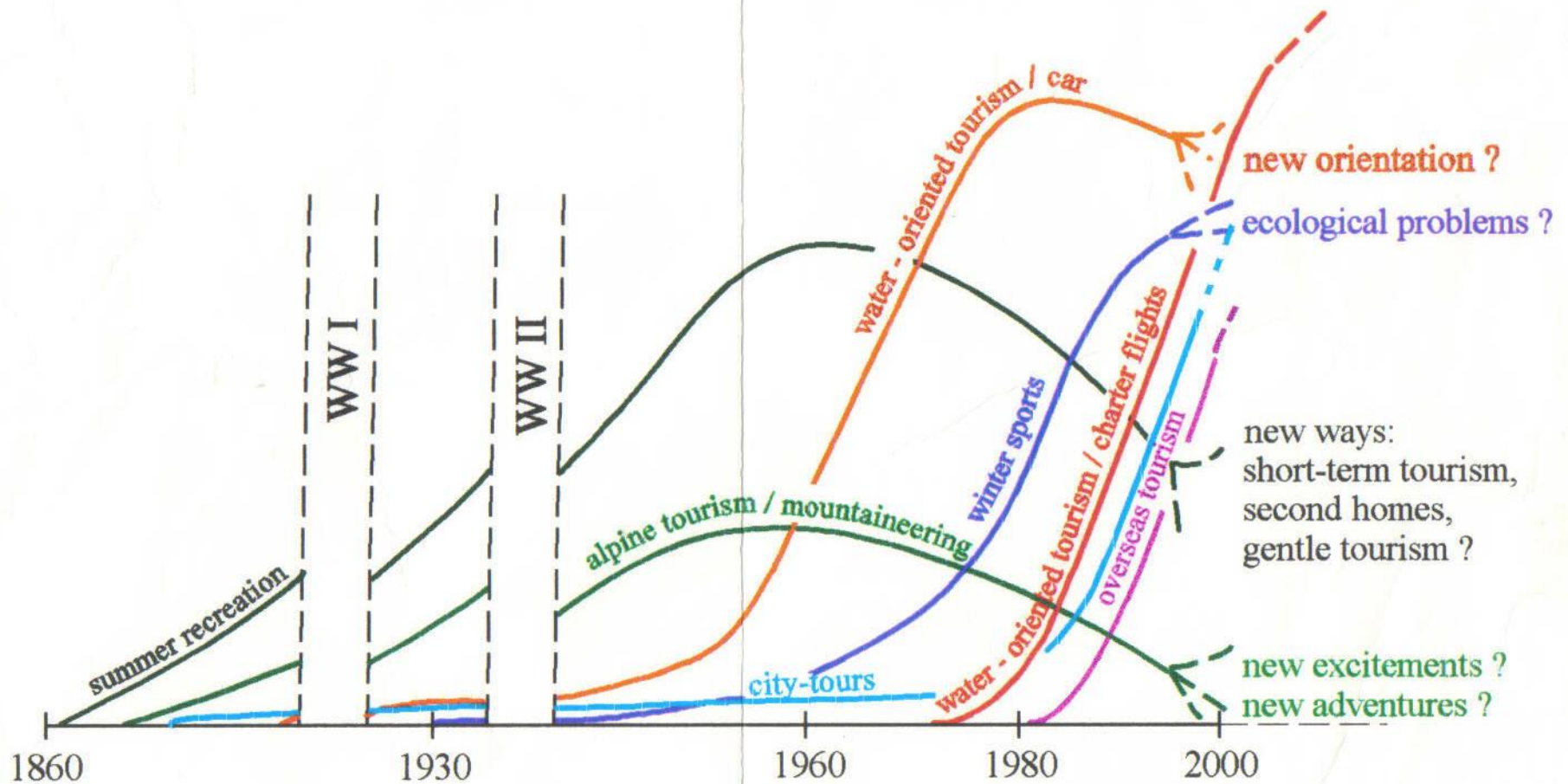
# Hypothetical Evolution of a Tourist Area



TIME

Butler, 1980

# European Tourism Products - A Product-Cycle Approach





## **Revolutionary changes:**

Thomas Cooke in U.K. in the 1830s

Disney in Florida in the 1970s

Gambling in Atlantic City in 1976

Developer/entrepreneur activity in

Gold Coast (Australia) in 1980s

Gambling legislative changes in

Macau in 1990-2000



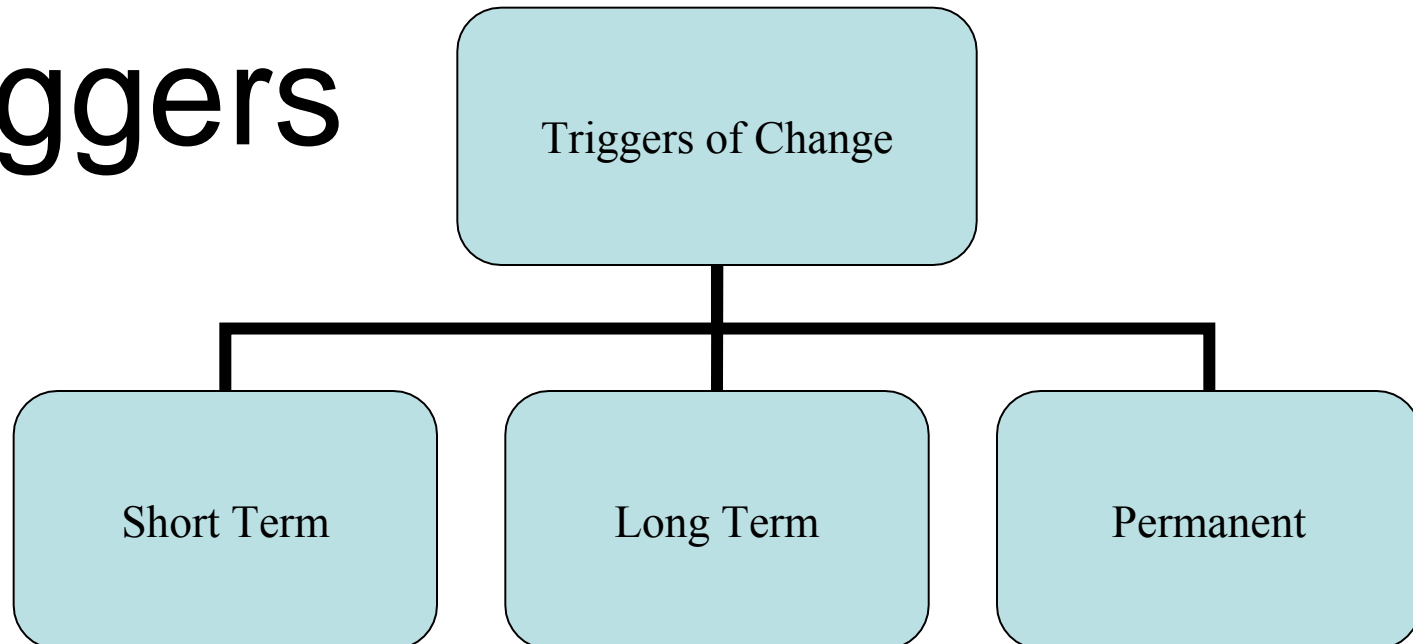


# Triggers

One of the key problems in trying to anticipate the nature of the future is to identify the triggers of change, the way in which they work, what they are related to, and their overall effects.



# Characteristics of Triggers

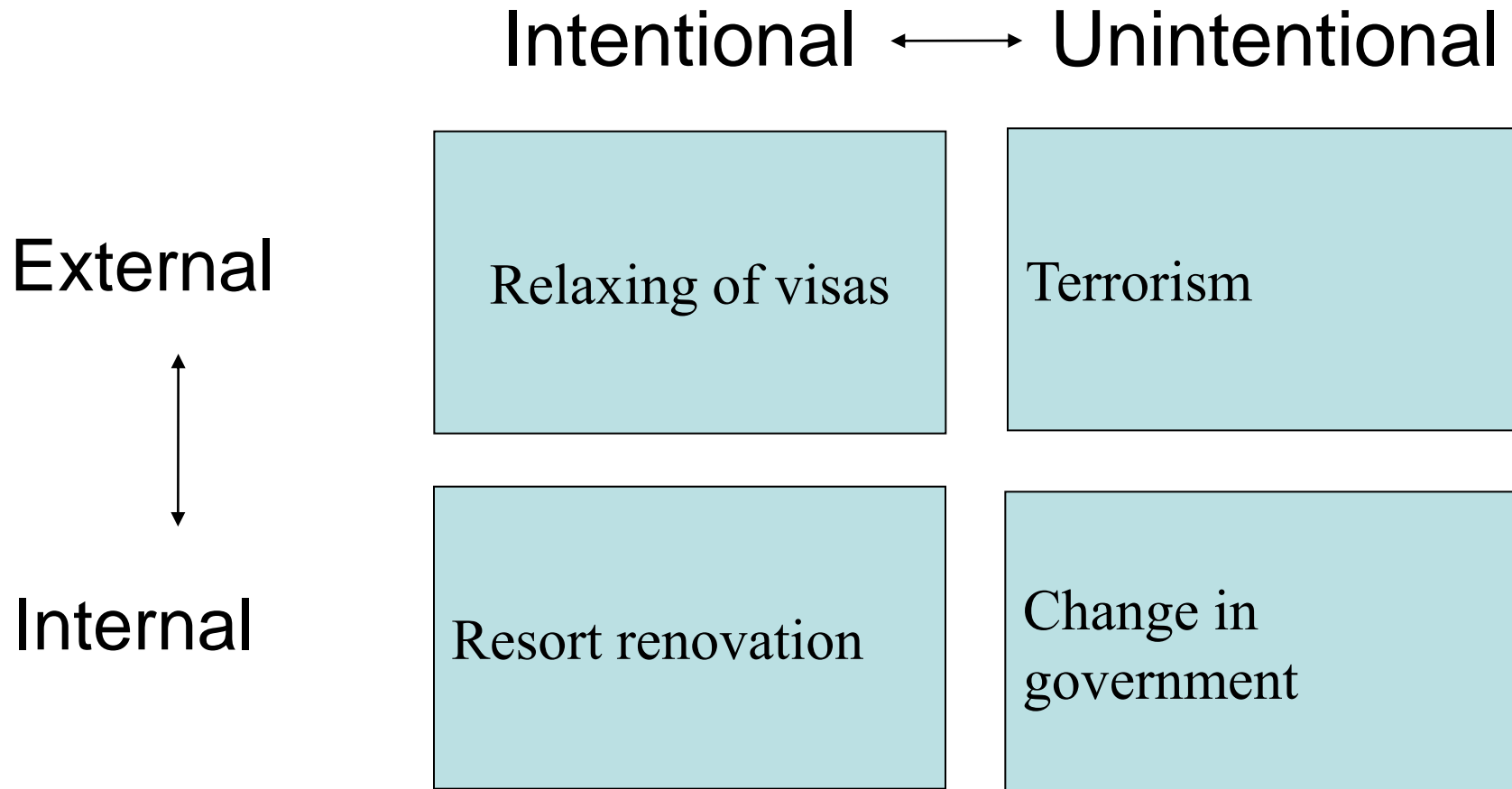




# Triggers cont.

Weaver and Oppermann (2000) suggest that triggers can be internal and external, intentional and unintentional, and use a four cell matrix to illustrate this.

# Four Cell Matrix



After Weaver & Oppermann, 2000





# **Apparent major triggers for change:**

Conflict (war, terrorism);

Rise in cost of travel;

Political change;

Catastrophe (tsunami, SARS, Avian Flu);

Government intervention;

Climate change.

# Sea level 1992



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**Strathclyde**  
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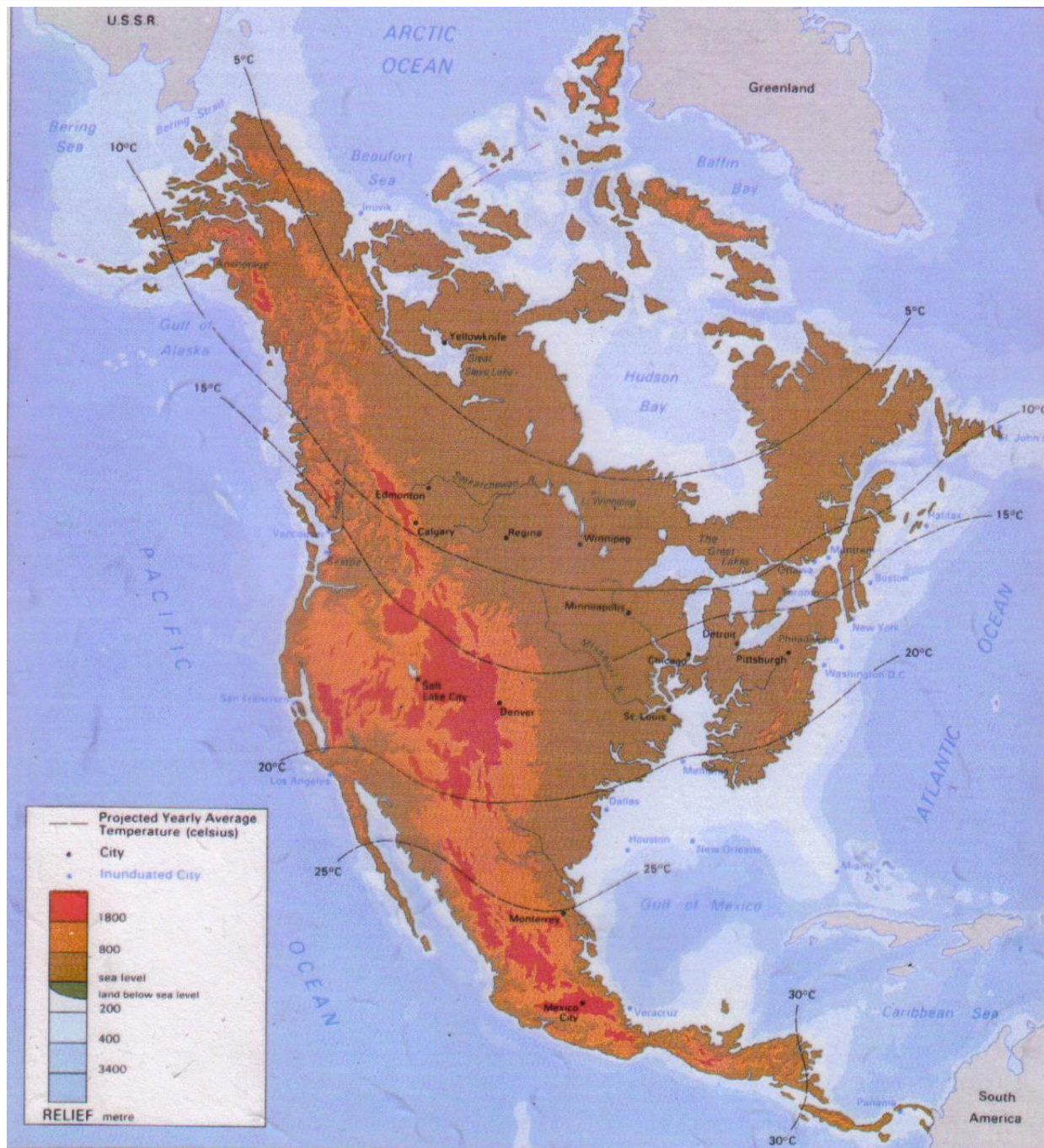






of  
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# Sea Level 2050





# 18<sup>th</sup> fairway, Old Course, St. Andrews: Why are sustainability and climate change important?





# Sea Level change: St Andrews



**Table 8.3** *Relative level of tourism-specific climate change knowledge and estimated impact of climate change on tourism, by IPCC region*

Region	Estimated impact of climate change on existing tourism destinations under B2 scenario	Relative level of tourism-specific climate change knowledge
Africa	Moderately–strongly negative	Extremely poor
Asia	Weakly–moderately negative (coastal areas most vulnerable)	Extremely poor (China and Japan are judged poor)
Australia and New Zealand	Moderately–strongly negative (Great Barrier Reef, Australian alps and coastal areas most vulnerable)	Poor–moderate (highest in Great Barrier Reef, rapidly increasing in Australian alps and coastal areas)
Europe	Weakly positive–moderately negative (Mediterranean coast most vulnerable)	Moderate (highest in alpine areas)
Latin America	Weakly–moderately negative	Extremely poor
North America	Weakly negative–weakly positive (coastal areas most vulnerable)	Moderate (highest in Canada)
Polar regions	Weakly negative–weakly positive	Poor–moderate (highest in Antarctic peninsula and Nordic countries)
Small islands	Strongly negative	Poor–moderate (highest in tropical and subtropical islands)



**SO:**

if what are thought to be major triggers do **NOT** appear to cause significant change in tourism, what does, and what might be those major changes?





# MAJOR CHANGES IN TOURISM?

- Growth;
- Rise in standards and expectations;
- Greater speed and lower cost of travel;
- Growth in additional holidays;
- Merging of tourism with leisure and recreation, and with retirement;
- Increasing appeal of health and experiential holidays.





## **MAJOR CHANGES IN TOURISM** cont.?

- Segmentation and niche markets;
- Changing role of IT and intermediaries;
- Growing appeal of SE Asia especially to youth;
- Rise of cruises;
- Rise in sport-related tourism;
- Rise in sustainable (?) nature-related tourism.



# **So what can we conclude?**

Tourism responds to triggers on a place specific rather than a global basis and location is important.

Most change is incremental and reactive...and predictable?

Participants are only partially “rational” and have very incomplete information.



Latest figures from UNWTO show 4% growth in first half of 2015.

“Results by destination are rather mixed”  
Europe gained from weaker Euro, Africa lost from terrorism, Ebola, poor exports.

Americas gained from US travel driven by strong \$.

INFLUENCES: MONEY (CURRENCY),  
DISTURBANCE. DISEASE. TRADE



# **Tourism in the Future:**

## **Geopolitical Drivers of Tourism**

C.Webster and S. Ivanov, 2015

***Journal of Tourism Futures,***

**1 (1) 58-68**



## **Drivers of Tourism?**

Fall of the American Empire,

Rise of BRICs and PINEs,

Increased global political instability,

Increased importance of regional supranational organisation,

Greater control by individuals of their travel patterns on a global level

Corporations more important and powerful than governments





# **Tourism in the Future**

## **Tourism Megatrends**

R. Buckley, U. Gretzel, D. Scott, D. Weaver,  
S. Becken 2015

## ***Tourism Recreation Research***

40 (1) 59-70



Social, economic and environmental consequences of ..climate change.  
Effects of higher fuel costs and social concerns on mass long-haul travel,  
Role of new technologies including Social Media,  
Economic growth and social change in BRICS, especially India and China,  
Armed conflict and geopolitical negotiation,  
Increasing linkages and conflicts between tourism and conservation in destination areas.



# THE FUTURE BALANCING ACTS

Poverty reduction in the “third world” (and urban/rural regeneration in the “first world”), i.e., tourist travel, against environmental impacts of increased air and road travel.

Moose survival against global warming. (Kill a moose and carbon offset a flight to Australia).



## **Key Questions:**

How will future tourists behave, Chinese and Indians in particular?

Will health issues change tourism patterns, e.g. skin cancer, HIV/Aids, SARS, Avian Flu, older tourists?

How will international labour migration and refugee flows affect the image and delivery of tourism, if at all?



## **Key Questions** cont.:

More global recessions?

Will climate change have an effect on global patterns, if ever?

Are there alternatives to tourism for “developing world” destinations? Do they really have a choice?





## **KEY QUESTIONS** cont.

What forces are capable of causing major changes in tourism globally?

Are they mostly exogenous forces?

Could we control/direct/prevent such force(s) if we can identify them?

Who would/should do this and on what criteria?



## **Definite(?) Trends:**

Western societies have an aging population but the elderly are behaving as if they are younger, although pension problems in the west may affect their travel

Oil will run out sometime, alternatives?

New destinations will be harder to develop

China and India will swell tourist numbers



## **Result:**

It will be necessary to make existing resorts more efficient, and crucially, more resilient to the even greater pressures they will face in the future. Efficiency includes better use of resources, reduction of congestion, removal of incompatible market segments and activities, improved transport services, and improved carrying capacity of resorts.

## **Short term “forecast”(1-5 years):**

Minimum change with slight growth.

Inconvenience grows in travel. Cost? + -

Europe's share of tourism arrivals continues to decline, Asia's share increases. Other areas relatively remain static with local fluctuations.

Cruise market continues to grow but slowly.

Visits to exotic areas continue to grow.



# **Medium term (6-15 years) forecast**

General patterns continue but slower growth from western markets.

Cruise market peaks, some sectors decline.

Some supporting sector failures, e.g theme parks.

Increasing reaction against large scale development but little real alternative.

Niches continue to increase relatively?

## **Long term (15+years) forecast**

Basic global distribution patterns remain generally stable.

If no fuel situation change, decline in long haul travel and thus some destinations, e.g. New Zealand .

Slowing of the democratisation of tourism?

Increase in pursuit of rarity/prestige by small numbers of tourists.

Greater variety in tourism patterns.



# BEYOND 2030?

Predictions unlikely to be accurate. BUT:  
Tourism likely to continue;  
Virtual/video/staycations unlikely to  
replace travel to tourist destinations;  
Themed tourism and themed destinations  
likely to increase (“Westworld”);  
Media of all types even more important;  
Future of oil crucial.



# Flights expected to double by 2033

Robert Lea Industrial Editor

Five jetliners are to be built every day for the next 20 years as aircraft manufacturers gear up to handle 7 billion passengers a year by 2033, by which time the annual number of internal flights in China will have overtaken the domestic US market.

These are headlines from the forecasters at Boeing, who believe that whatever gets thrown at the aviation industry — in the past 20 years it has been recessions, pandemics, Middle Eastern wars and 9/11 — the amount of air travel will rise at 5 per cent a year, easily outstripping global GDP growth, which is predicted to rise at 3.2 a year.

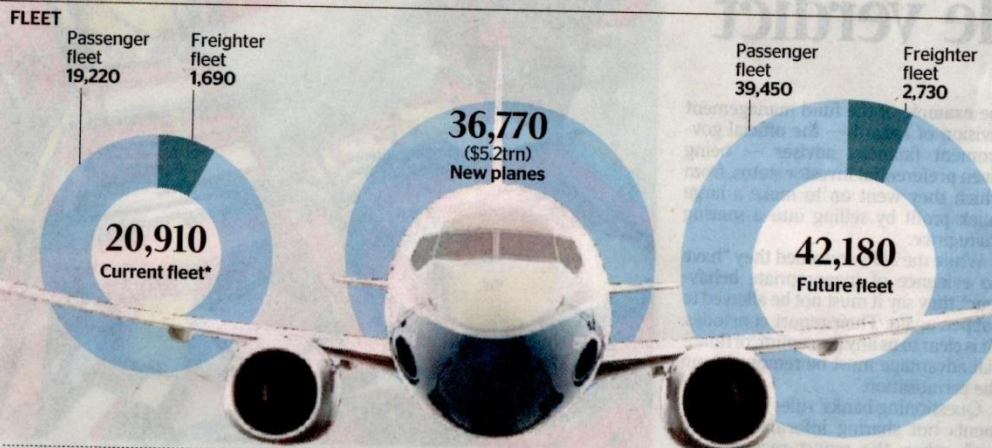
According to Boeing's much-vaunted 53-year old annual publication, *Current Market Outlook*, the number of planes in the skies will more than double from the present 20,910 to 42,180 in 2033.

Of the present fleet, a quarter are expected to still be in commission 20 years later. At expected rates of demand that means Boeing and its great rival Airbus, which between them control the vast majority of the market, will be expecting to build 36,800 planes.

At about \$100 million for a Boeing 737 or Airbus A320, the workhorses of the budget airlines and the short-haul sector, and \$400 million for the giant of the skies, the double decker Airbus A380, all those new aircraft at current list prices will cost the world's airlines a total of \$5.2 trillion. More than 25,000, or about 70 per cent, are expected to be either 737s or A320s, known as single-aisle aircraft and the sort of planes Ryanair and easyJet will only ever order.

According to Randy Tinseth, Boeing's vice-president of marketing, the expected increase in passengers flying — 133 per cent over 20 years from the current 3 billion — will outpace the expected production of aircraft. But that, he says, is because the industry is getting smarter. "Technologically, the aircraft are more capable, flying longer

## The unstoppable rise of air travel



## PLANES To be delivered by 2033



## LEADING THE GROWTH



hours, longer routes. The cost of flying has been reduced by better airline management. Smarter seat design giving the same comfort levels means you can get more seats on board," he said. "By 2033, aircraft will be 25 per cent more capable than they are today. Without that technological development we would be needing to build 10,000 more aircraft [than the 36,800 expected]."

Air travel within North America — the original home of the commercial jetliner — is the single biggest segment of the global market. Within 20 years intra-North America flights will have not only been overtaken by the within-Asia Pacific market (not including domestic China travel) but also by the domestic Chinese market. Those Far Eastern markets are expected to grow at about 6.5 per cent a year compared with 2.3 per cent in North America. The intra-European market will become the fourth largest market — from third — and is expected to continue to rise by 3.5 per cent a year.

The two single fastest growing markets, though coming from much lower bases, are the Middle East to Asia-Pacific market, expected to rise by 7.4 per cent as Dubai, Abu Dhabi and Doha emerge as the great, global hub airports; and the long-awaited rise of the Latin American market, where travel around the continent is expected to increase by 6.9 per cent.

Which type of planes will be flying these routes is the point of Boeing's current market outlook: giving the US giant the sort of statistical ammunition for it to believe that its strategy of building a mid-sized long-haul jetliner — the 787 Dreamliner — is the future rather than Airbus's big bet on the A380.

Boeing believes the market for large wide-body aircraft — its 747 class, which is being wound down, and the A380 — will be for only 620 to be delivered over the next 20 years. Airbus reckons demand for the largest aircraft will be nearly three times that figure.

Source: Boeing





# Implications :

Both linear and chaos models are applicable to tourism, depending on location and form.

Markets appear to want more personal and specific features/holidays, but many mass destinations are becoming more similar so real choice is affected by cost and ease of access. Our generation grew up as tourism expanded and takes travel and tourism for granted as normal behaviour, it may not continue to be so.



# Reality:

There is no realistic alternative to mass tourism, and no other way of catering to very large numbers of tourists than the mass tourist resort. Sustainable tourism and sustainable resorts are not capable of handling one billion (or more) international tourists each year, let alone as many as ten billion more domestic tourists.



# Conclusions

Reversions to “normality” after turbulence may take longer than at present because of greater media influence, globalisation and integration. Changes will occur mostly on the “margins” in global spatial patterns and forms of tourism, and most changes will be place specific.

**Stability and inertia will win out over dynamism (assuming no global disaster/catastrophe).**



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