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## **Anticipating tomorrow's tourism: unveiling the most significant trends for the next five years**

Teresa Costa - [teresa.costa@esce.ips.pt](mailto:teresa.costa@esce.ips.pt)

Filipe Segurado Severino

Maria de Lurdes Calisto

Ana Teresa Machado

Zélia Raposo Santos

João Ferreira do Rosário



# Introduction

- Tourism is one of the most important sectors of the global economy. In 2019, tourism accounted for 10.3% of the global gross domestic product (GDP) and around 10% of total employment (World Travel and Tourism Council, 2022). Between 2016 and 2019, international tourist arrivals increased by 17 %, surpassing 1.4 billion in 2019 (UNWTO, 2020).
- This positive evolution has been interrupted by the COVID-19 pandemic.
- Nevertheless, the activity is recovering, and it is expected that tourism activity continues to push the global economy; however, its vulnerability to macro environment events is undeniable. All this sanitary crisis confirmed tourism's vulnerability concerning disruptive occurrences (Aldao, Blasco and Espallargas, 2022).
- Consequently, tourism entrepreneurs must be aware of the tourism environment and understand the macro environment emerging trends.



# Tourism and macro environment

- Previous studies have emphasised the impact of the macro environment on the tourism value chain at several levels or dimensions, namely economic environment, political and legal environment, sociocultural environment, international environment, and infrastructure environment

Authors	Dimensions of macro environment
Bianchi (2018) ; Ghalia, Fidrmuc and Samargandi (2019)	Open and stable political and legal institutions are critical for tourism organisations and the economy in general.
Ha et al (2022) ; Croce (2018); MacNeill and Wozniak (2018); Marin (2015); Tohmo (2018)	Reinforce the importance of economic factor
Dwivedi (2021) ; MacNeill and Wozniak (2018)	Infrastructure is also crucial for tourism
Ooi et al (2015); Zhuang, Yao and Li (2019). For Buckley, Guitart and Shakeela (2017)	Sociocultural factors



# Objectives

- It is consensual that tourism is crucial to the global economy, but macroenvironmental changes can severely impact it. Both aspects are crucial issues for tourism entrepreneurs.

## Objective

- Understand the emerging trends that entrepreneurs may face.

## Starting Question

- The study aims to identifying the macroenvironmental factors that influence tourism activity and predicting the most likely future trends and events that will impact the industry.

The following research question is:

**What are the current and future trends that entrepreneurs should prepare for?**



## Method

A systematic literature review and in-depth interviews were combined



Identify the macroenvironmental determinants of tourism activity and predict future trends and events in the sector

### The systematic literature review was conducted in three stages:

- Selection of relevant sources (Web of Science and Scopus indexing)
- Evaluation of the selected articles based on exclusion criteria
- Comprehensive analysis of final set of selected articles to identify emerging trends



## Method – Systematic Review

### Data collection process: Scopus and Web of Science

- Keyword combination: (challeng\* OR trend\* OR opportunit\* OR threat\*) AND (hospitality OR touris\* OR hotel\*).

### Search criteria:

- Publication year (from 2008)
- Document type (articles)
- Disciplinary area (all areas of academic knowledge)
- Language (english)

**Total** = 489 from Web of Science + 1313 from Scopus

- After removing duplicate articles = 1436 studies

### Quality evaluation:

- Articles from Scimago Ranking's first or second quartiles
- Cut-off point based on publication year
- (2014 for Scopus +2015 for Web of Science) and citation count (more than 14 or 23 citations)
- Results of 842 articles

### Application of relevance and exclusion criteria:

- Do not identified impact in T&H
- Application context being to specific (region, type of product or service)

Consequently, the final number of articles to be included in the review was:

**55**



## Method – Interviews

- The study found **eight specializations** among **thirteen interviewees** with experts in the identified impact factors, using semi-directive and open-ended questions:

- Demography
- Generations
- Economy
- Technology

- Sustainability
- Security
- Public health
- Policies

- The script had questions about the **systematic review's themes**, **important future events**, **unaddressed themes**, and the **tourism sector's potential implications**.



# Findings and discussion – Systematic Review

- Evaluation includes 55 publications grouped by macroenvironmental variables

Factor	Absolute frequency	Percentage
Political-Legal	14	25 %
Economic	5	9%
Socio-cultural	12	22%
Technology	13	24%
Sustainability	11	20%
<b>Total</b>	<b>55</b>	<b>100%</b>

## Concentration in recent years of articles by macroenvironmental factors:

- Technological (mainly digital technologies)
- Sociocultural (focus on COVID-19 and sustainability behavior)
- Political-legal (geopolitical aspects and socioeconomic policies)





## Findings and discussion – Systematic Review

Sustainability presents a more balanced distribution of articles throughout the analyzed period



Centered on the issue of climate change and environmental degradation

The majority of studies address an international context at the continental or European Union level.

There are also nationally oriented studies, especially in the USA and the UK:

- Political-legal (specific institutional and regulatory contexts)
- Sustainability (effects on tourist destinations).

**Types of studies:** Quantitative (27); Literature review (16); Qualitative (8); Mixed methods (2); Conceptual (2).



## Findings and discussion – Systematic Review

### Identification of key themes by factor:

Political-legal: Geopolitics/political-institutional instability and local politics.

Economic: Economic crisis, financial crisis, economic growth, and macroeconomic factors (multiple consequences in T&H sector).

Sociocultural: Millennial generation, environmental behaviors, COVID-19.

Technological: Mobile technology, big data, robotic technology, and digital transformation.

Sustainability: Climate change and environmental management by hotels.



# Findings and discussion – Interviews

Future trend areas	References	Number of distinct interviewees	Areas of expertise of the interviewees
Economic Model	31	2	Economy, Sustainability.
Innovation	29	4	Economy, Public Health, Security, Technology.
Public Policies	14	4	Economy, Public Health, Security, Sustainability.
Environment	10	3	Generations, Security, Sustainability.
Cybersecurity	9	2	Security, Sustainability.
Pandemics, outbreaks, and diseases	7	4	Demography, Generations, Economy, Public Health.
Demography	6	1	Demography.
Economic Cycles in the short and medium term	4	1	Economy.
Migrations	3	2	Generations, Public Health.



Project reference: PTDC/EDE-OGE/2146/2021





## Findings and discussion – Interviews

### Economic model

- Prominent trend;
- Regional globalization;
- Digital transformation + Complementary energy + transition processes + circular economy;
- Sustainability = change in economic structure and individual behaviour.

### Innovation

- Continuous innovation in healthcare
- Continuous technological innovation
- Fields of health and technology = Significant strides!

### Public Policies

- Environmental and sustainability policies + corporate and society management = highlighted;
- Rail and urban transportation;
- Human security.



## Findings and discussion – Interviews

### Cybersecurity

- Computer criminality;
- Threats to human security;
- Increasing of cybersecurity
- Need of specialist + good design of security systems + cloud-based systems.

### Pandemics, epidemics and diseases

- Increase in multidrug-resistant bacteria and antibiotic resistance;
- Outbreaks and pandemics caused by climate change;
- Health issues with no immediate or intermediate solutions;
- Food production + environmental factors.

### Environment

- Disasters = Environmental migrations;
- Lack of political will + capitalist economic model + limited execution capacity;
- Must be consider values like sustainability + political accountability + ecosystem service recognition.



## Findings and discussion – Interviews

### Demographics

- Increase in life expectancy;
- Population increase through migration;
- Effect of migration = Unclear.

### Migrations

- Migrations caused by climate change;
- Worsening living conditions;
- Strain recipient nations' healthcare systems.

### Short and medium-term economic cycles

- Stagflation;
- Short-term economic recession in Europe;
- Medium-term economic recovery in Europe.



## Findings and discussion – Interviews

- Four emerging trends are most likely to occur in the future:



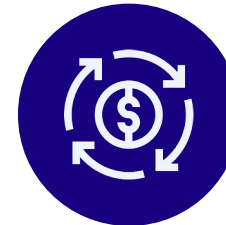
Digital transformation



Climate change



Computer crime



Circular economy

- Based on the frequency of references, diversity of responses, and relevance to the topic.



## Conclusions

This study identified prevalent themes:

- Literature: Technology; Sociocultural factors; Political-legal Dynamics; Sustainability.
- Interviews: Four emerging trends.

**The study results emphasize the increasing significance of technology, sustainability and socialcultural factors in the tourism industry, as well as the need for theoretical advancements and additional study.**

Future research:

- Develop more plausible scenarios;
- Questionnaires + stakeholder focus groups.





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