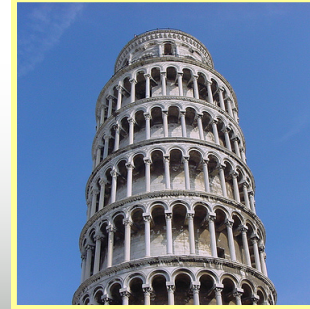




World Tourism Organization
SUSTAINABLE DEVELOPMENT OF TOURISM

The International Scenario



6TH EDITION OF THE EUROMEETING

For a European Sustainable and Competitive Tourism between Participation and Measurability

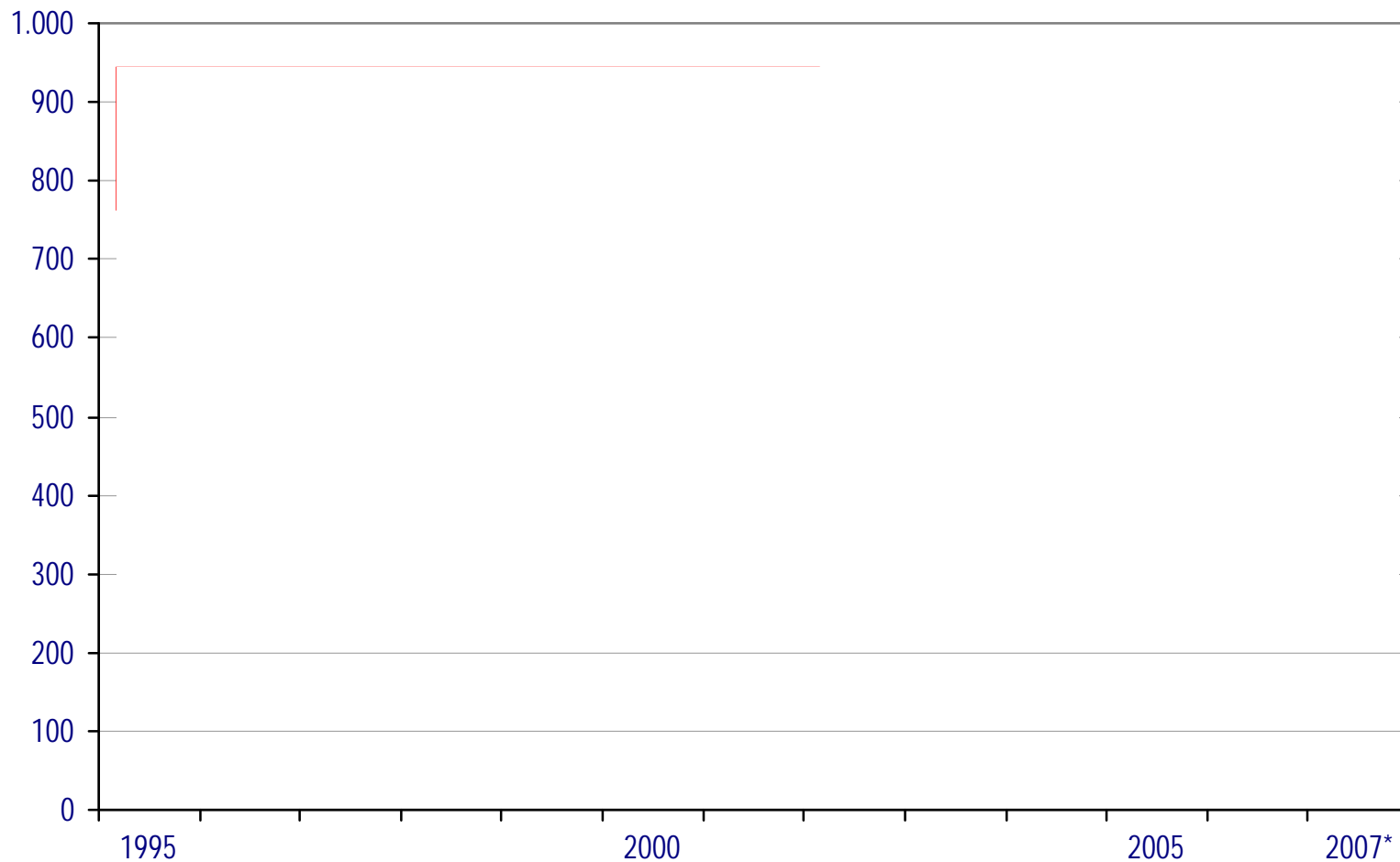
Rimini, Italy, 27 November 2008

Luigi Cabrini
Director
Sustainable Development of Tourism
World Tourism Organization



Arrivals Grow from 800 to 900 Million in Two Years

- **903 million international tourist arrivals in 2007**
- **+6.6% as compared to 2006**

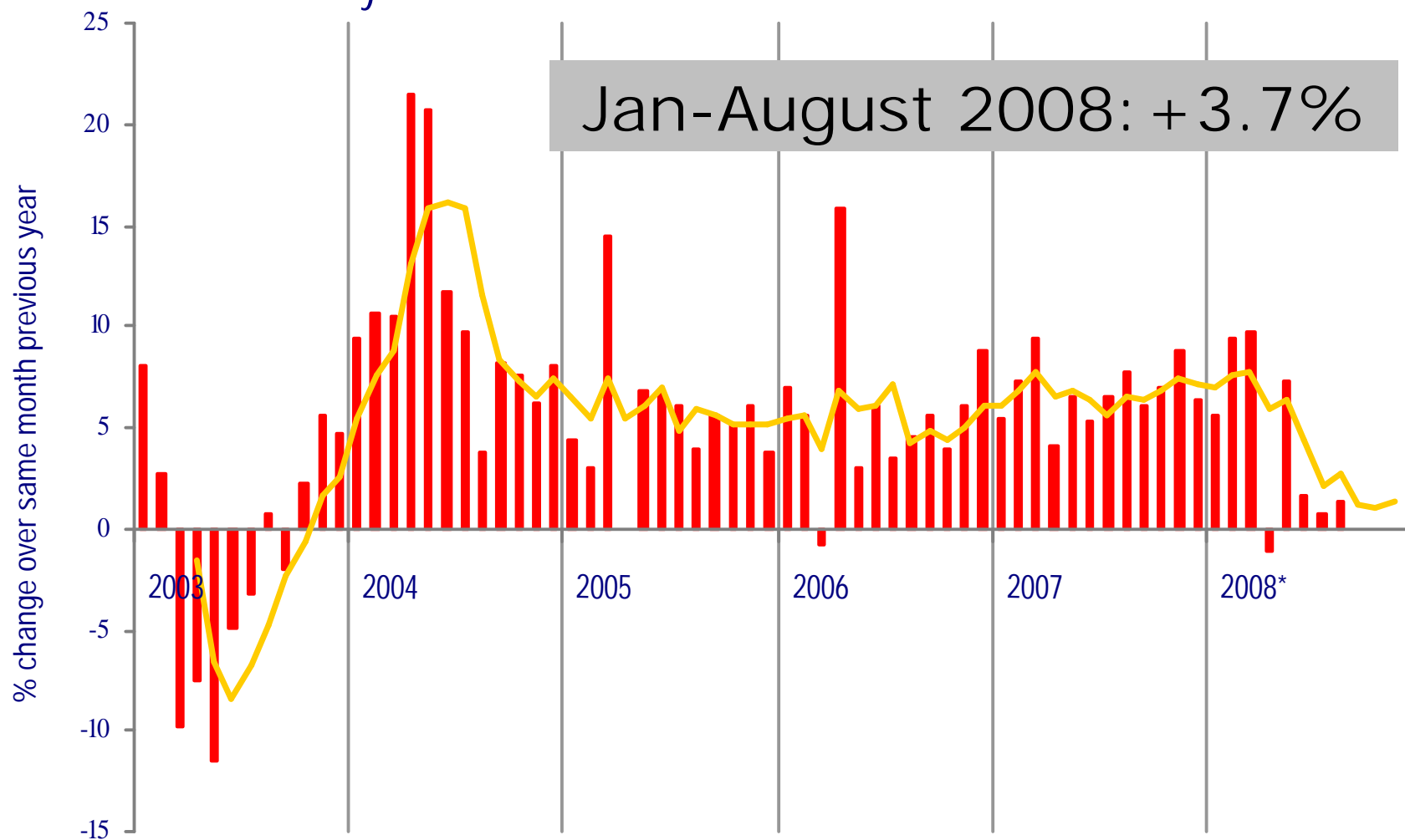


Source: World Tourism Organization



World Tourism Performance 2008

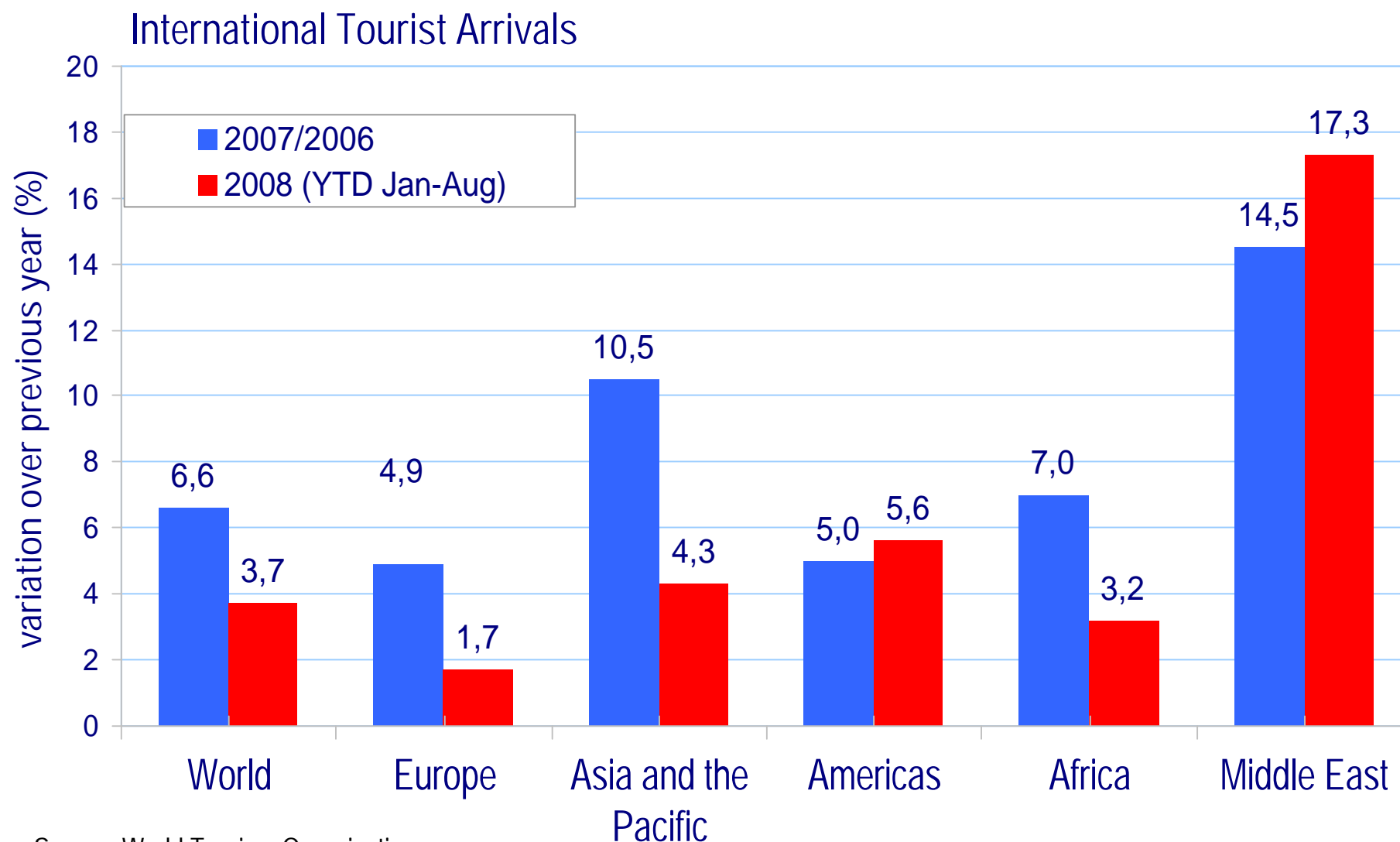
Monthly evolution of worldwide international tourist arrivals



Source: World Tourism Organization



January-August 2008 Growth Rates by Region

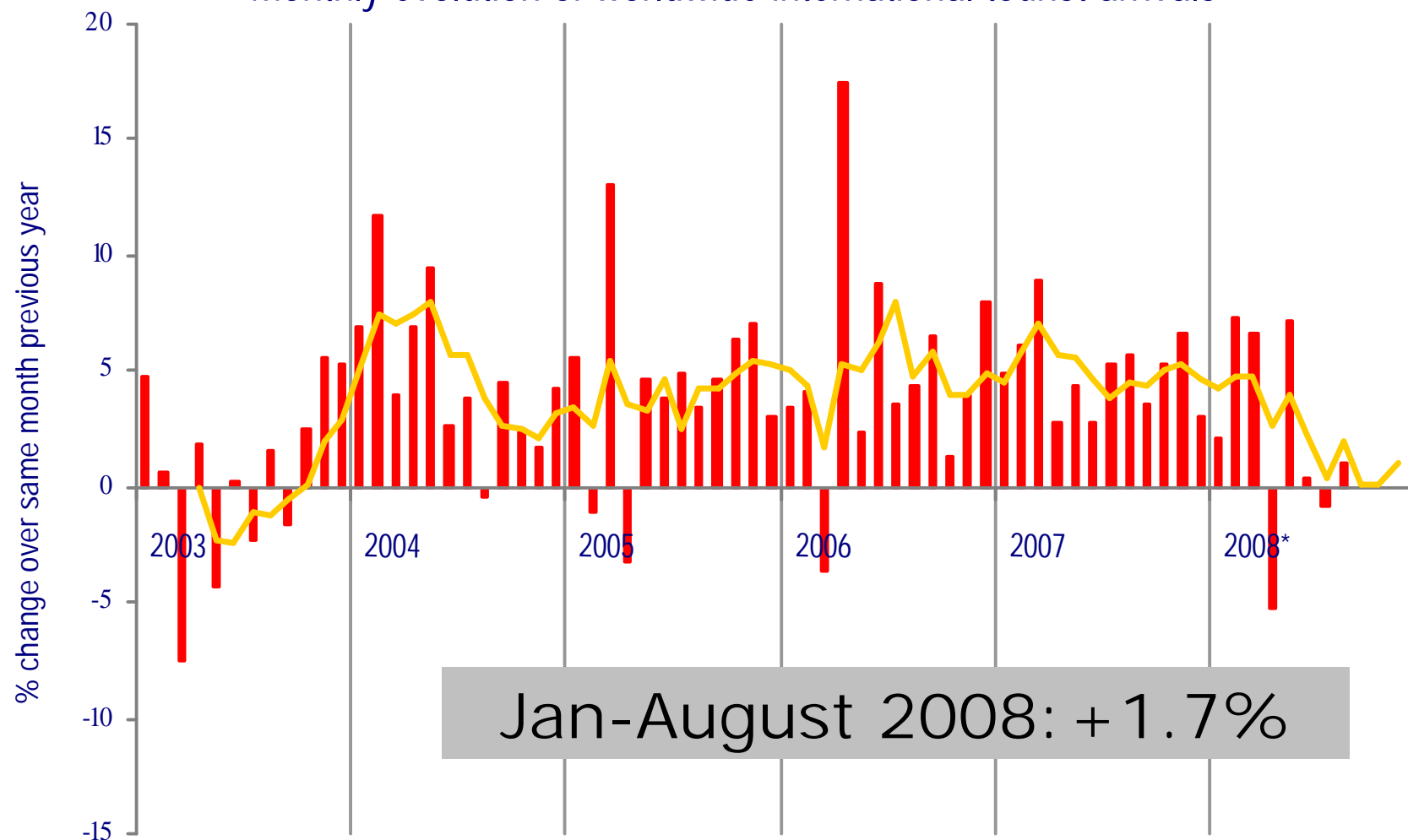


Source: World Tourism Organization



Europe's Performance 2008

Monthly evolution of worldwide international tourist arrivals

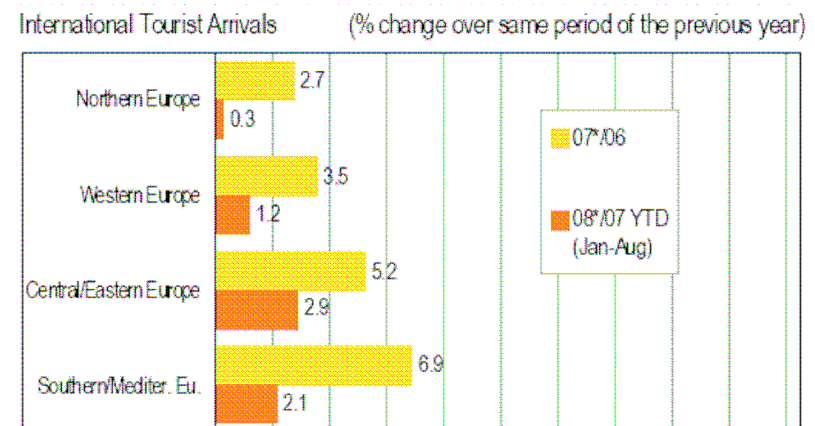


Source: World Tourism Organization



Trends in Europe

- Growth in Europe **stagnated over the summer months**.
- Europe currently stands at **+2% for the first eight months** of 2008 (well down from the 5% growth of the last two years).
- The slowdown **has not spared any of its four sub-regions**.
- **Rising concerns** about the deteriorating world economic climate, the scarcity of credit, the strong euro, higher fuel costs and declines in consumer spending power.
- There is also an expectation that **business travel and the meetings industry** will be the first to really suffer in major downturn.
- Viability of **low-cost carriers** will be challenged.
- **Little prospect expected** for the growth of European tourism over the next few months.



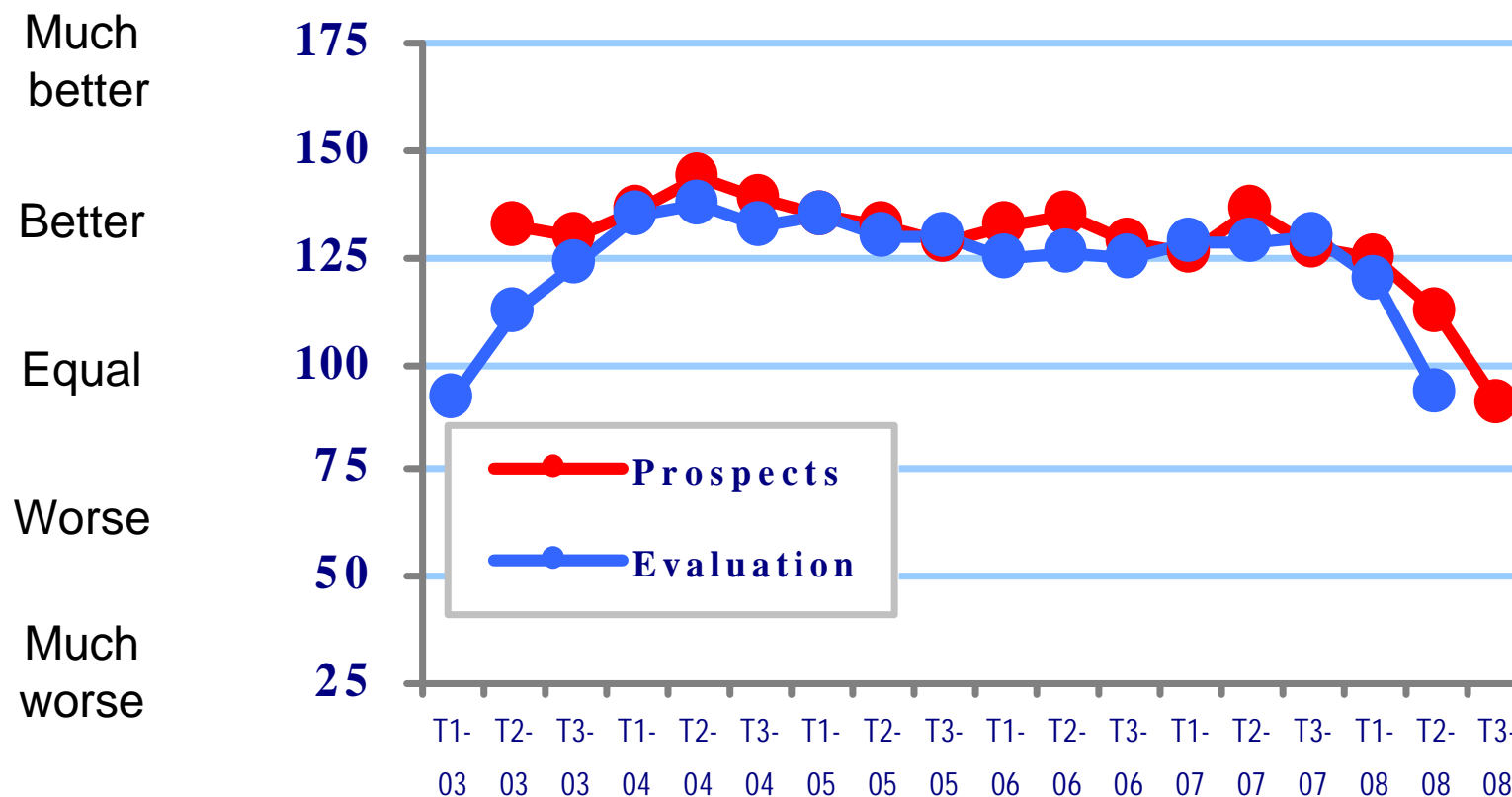
Source: World Tourism Organization





UNWTO World Tourism Barometer Confidence Index

UNWTO Panel of Tourism Experts, World



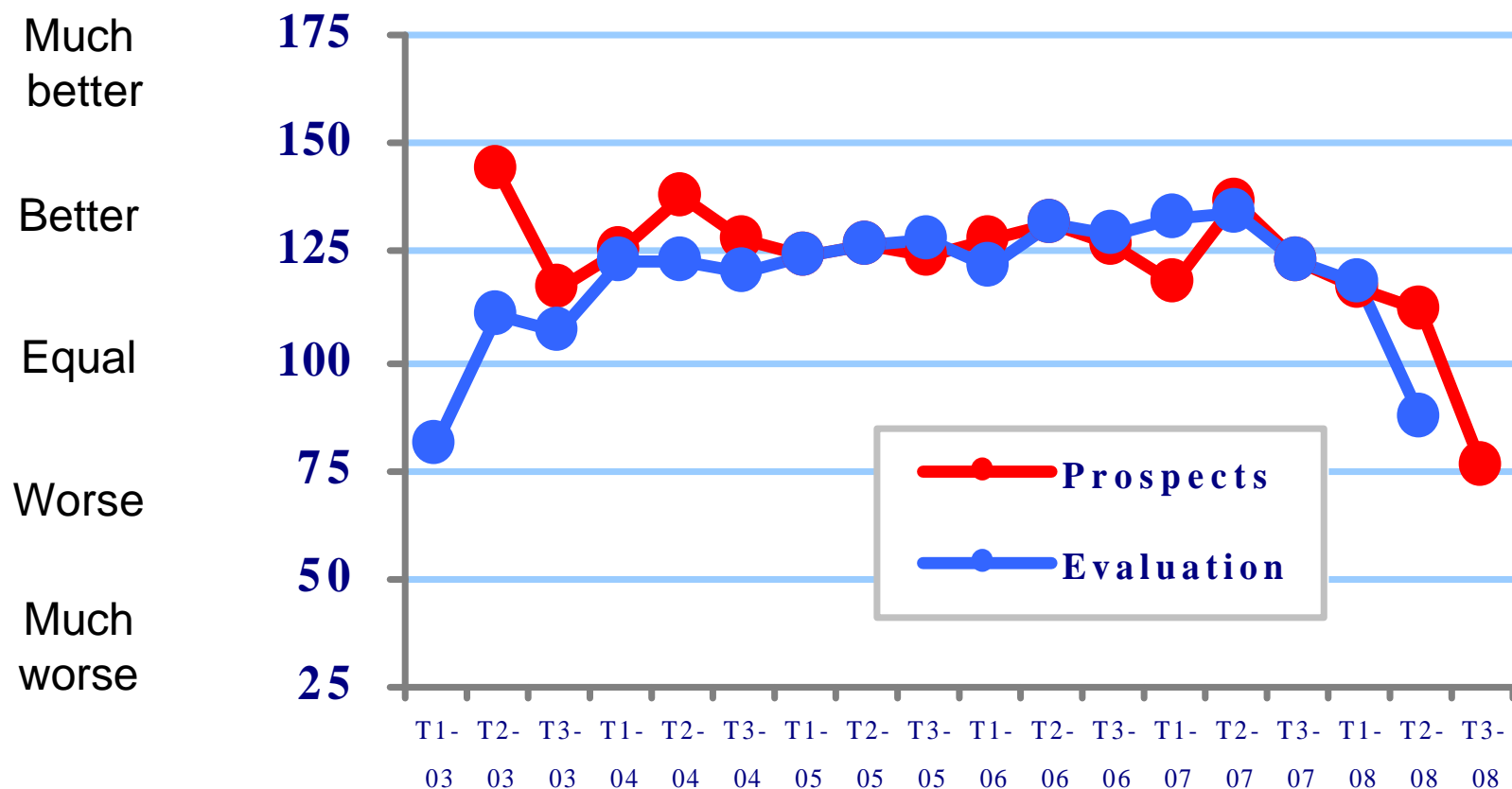
Source: World Tourism Organization





UNWTO World Tourism Barometer Confidence Index – Europe

UNWTO Panel of Tourism Experts, World



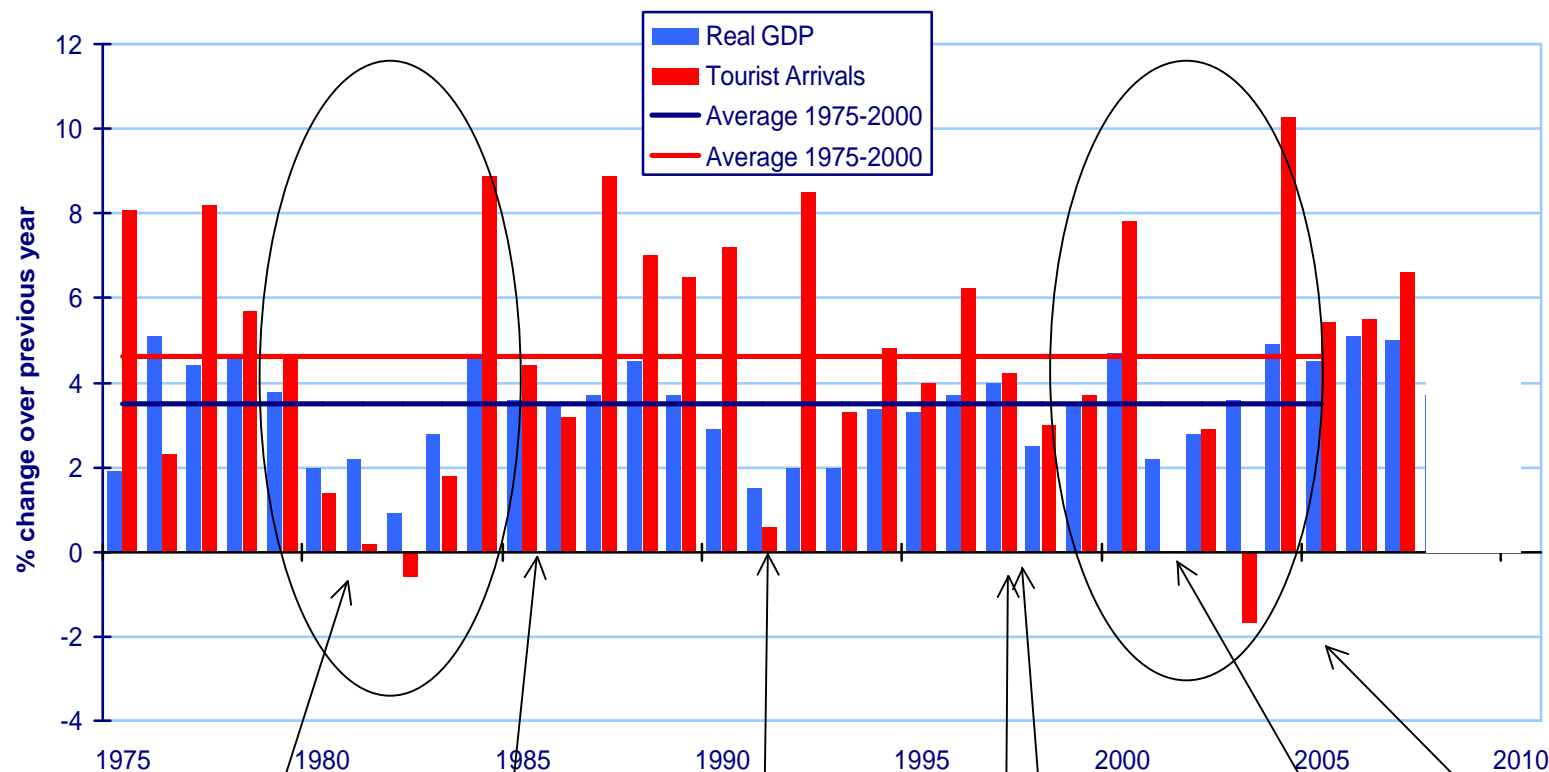
Source: World Tourism Organization





Tourism, Economy and External Shocks

World, Growth of Real GDP & International Tourist Arrivals



Echo of the second oil crisis / martial law in Poland / Falklands conflict / conflict Israel Lebanon

Chernobyl disaster

Gulf War / dis-integration of Yugoslavia

Asian Financial Crisis

Kosovo

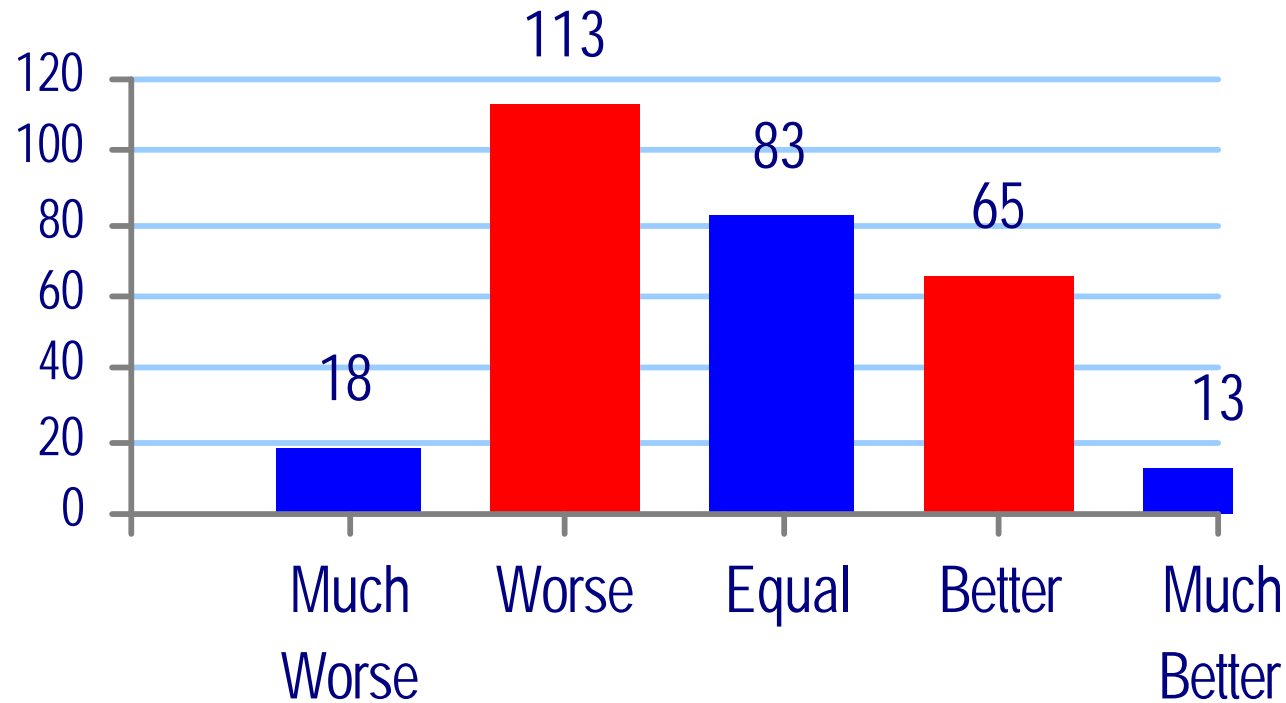
11S

Iraq, SARS



UNWTO Panel of Tourism Experts's Prospects at its Lowest Level since 2003

UNWTO Panel of Tourism Experts, World
Sep-Dec. 2008 prospects





International Tourism Forecast 2009

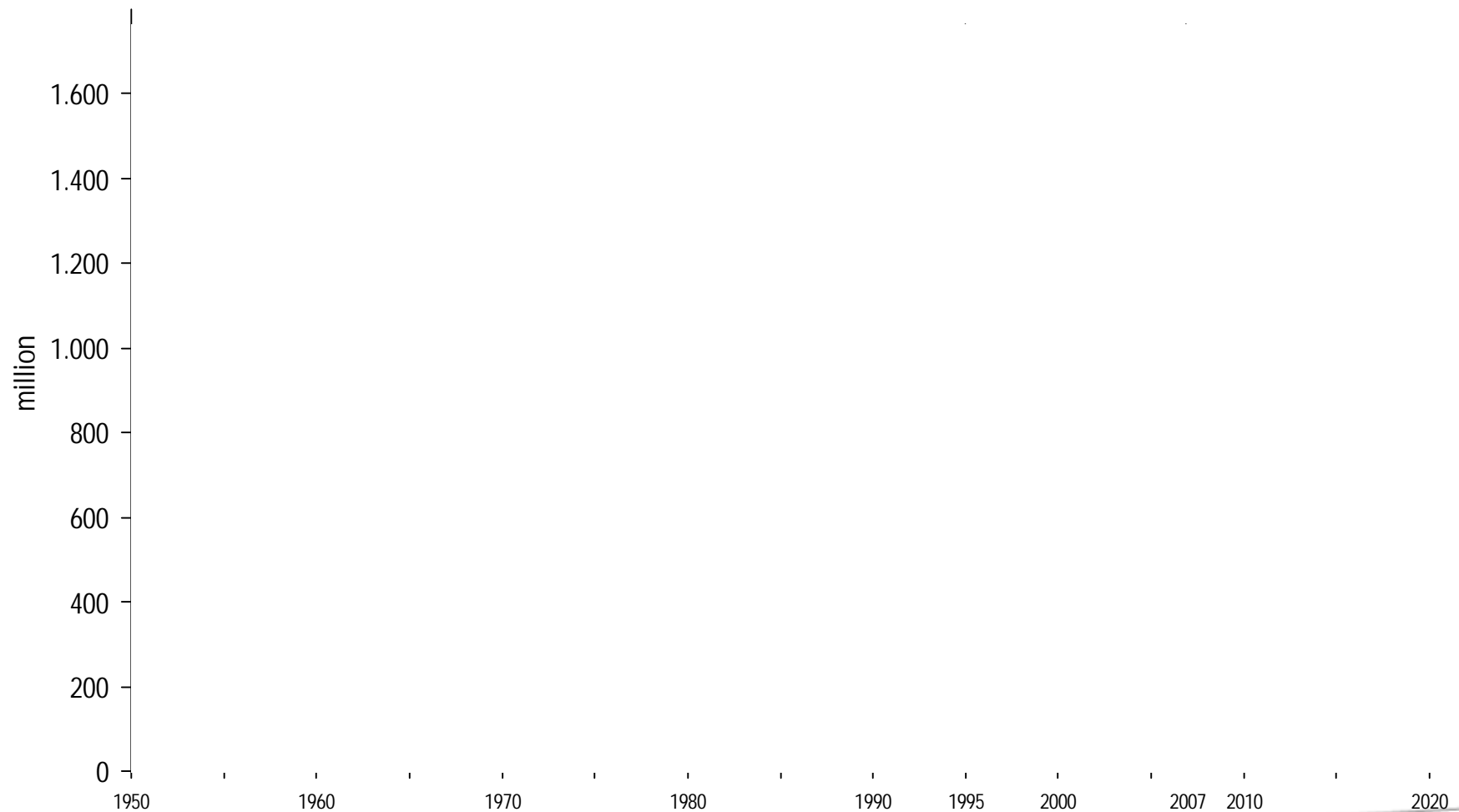
Region	Full year estimates <i>2008</i>	Forecast <i>2009</i>
World	2-3%	0-2%
Europe	1-2%	0-2%
Asia and the Pacific	2-3%	0-2%
Americas	4-5%	1-3%
Africa	3-5%...??	2-6%...?
Middle East	9-15%...??	3-8%...??





International Tourist Arrivals, 1950-2020

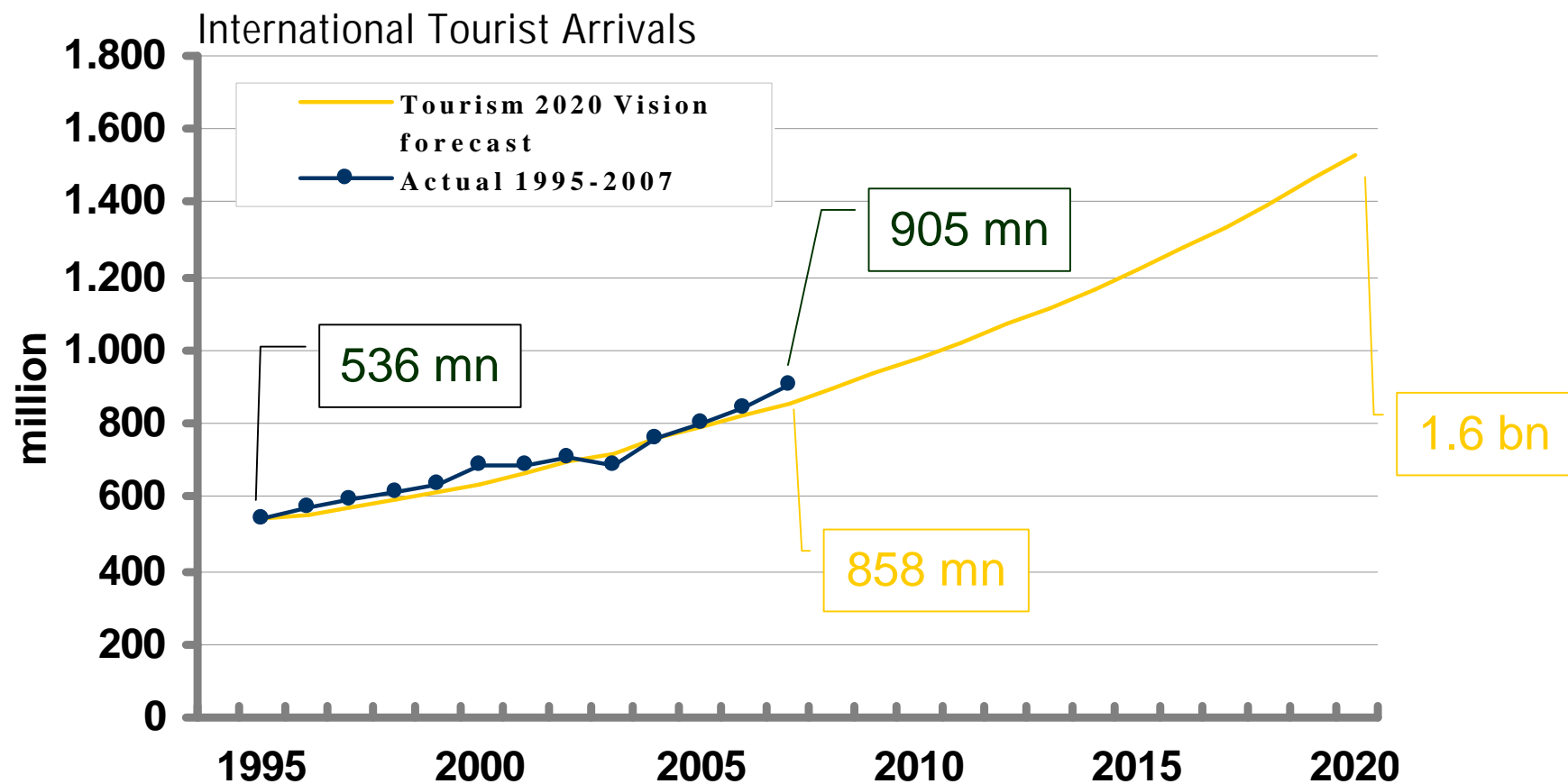
Current Situation and Forecasts UNWTO Tourism 2020 Vision





Actual trend vs. Tourism 2020 Vision Forecast

World



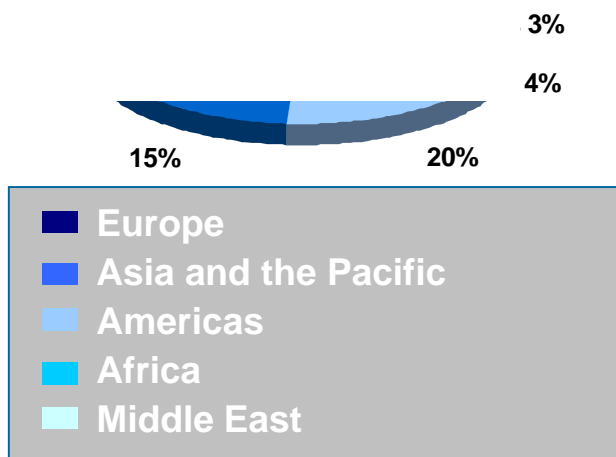


International Tourist Arrivals by Region of Destination

Rank	1950	Share	1970	1990	Share	2007	Share
1	United States	71%	Italy	France	38%	France	33%
2	Canada		Canada	United States		Spain	
3	Italy		France	Spain		United States	
4	France		Spain	Italy		China	
5	Switzerland		United States	Hungary		Italy	

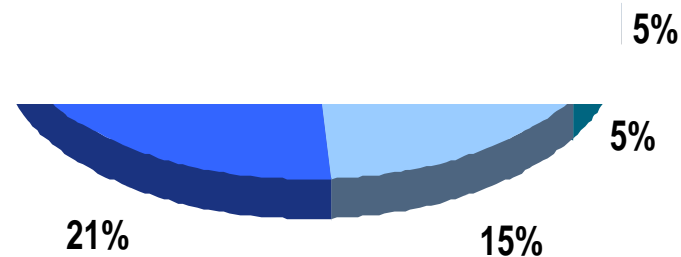
Market Share (%) - 1995

58%



Market Share (%) - 2007

54%





UNWTO's Main Strategic Objectives

Ensure the continuous improvement of destinations' competitiveness, through updated information and data on market trends, preparedness to face crises and adequate evaluation of the economic contribution of tourism.

Promote the sustainable development of tourism in Member States in line with the Global Code of Ethics, to contribute to the MDGs and to worldwide socio-economic development.



