



**“The Role and Importance of the European Tourism in the Global Tourism Flows and Trends by 2030”**

**CROATIAN TOURISM DAYS**

18 – 19 October 2012  
Dubrovnik, Croatia

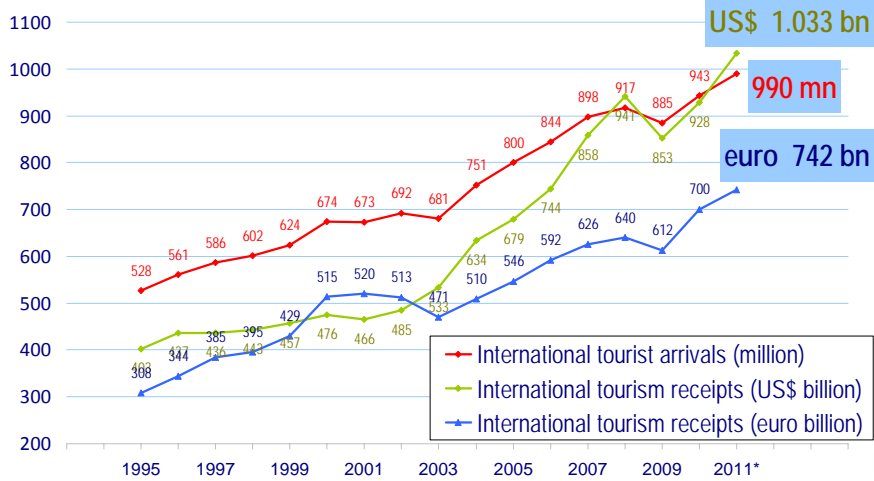


**Current situation**

**World and Europe**

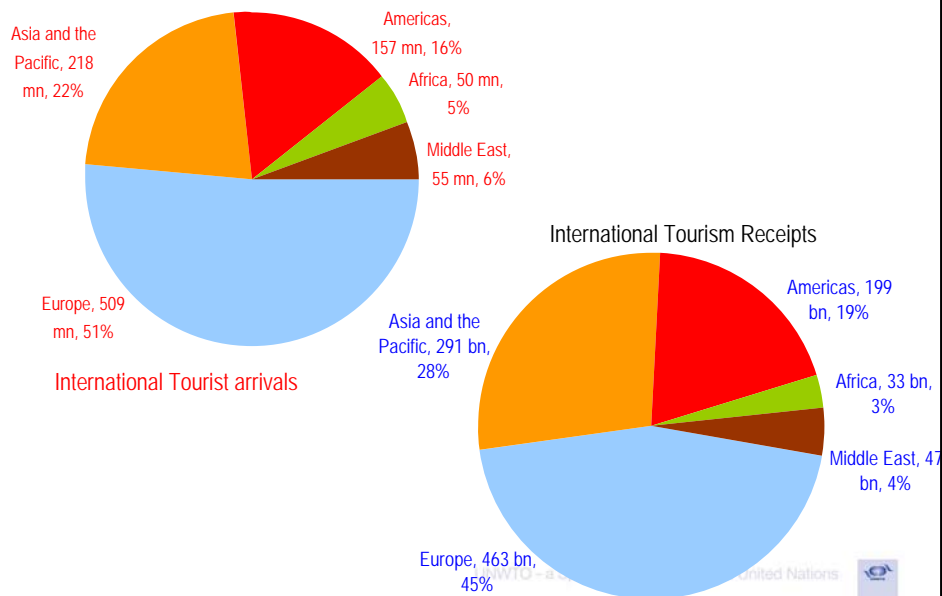
## Inbound tourism: World 2011

International tourist arrivals and receipts, 1995-2011



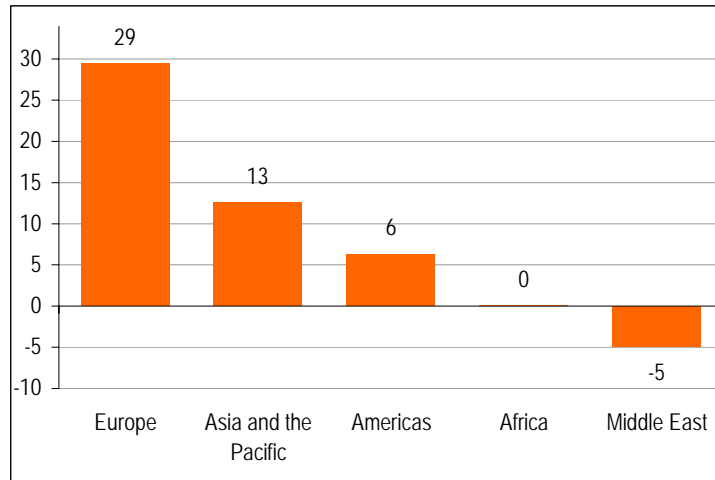
Source: World Tourism Organization (UNWTO)

## Share 2011 by region



## Increase 43 million arrivals in 2011: by region

International Tourist Arrivals (absolute change 2011, million)

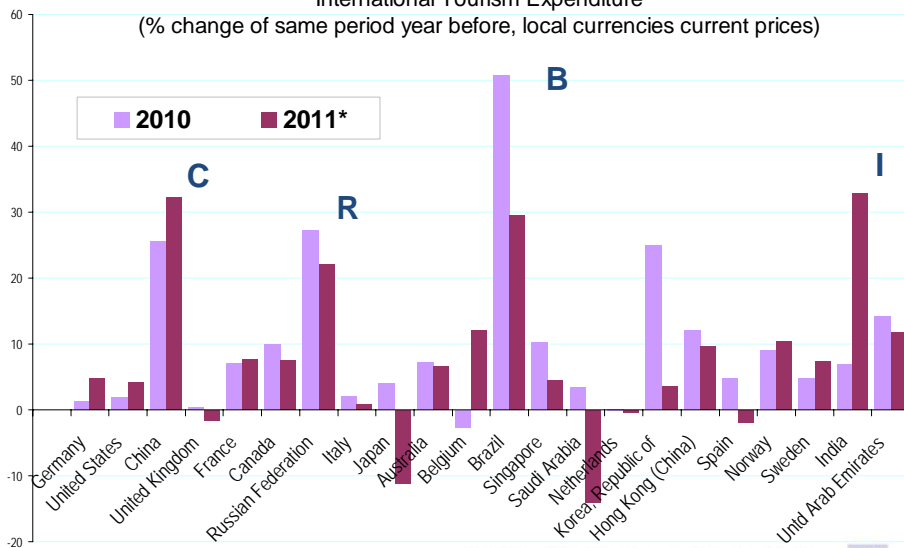


Source: World Tourism Organization (UNWTO) ©



## Major outbound markets

International Tourism Expenditure (% change of same period year before, local currencies current prices)

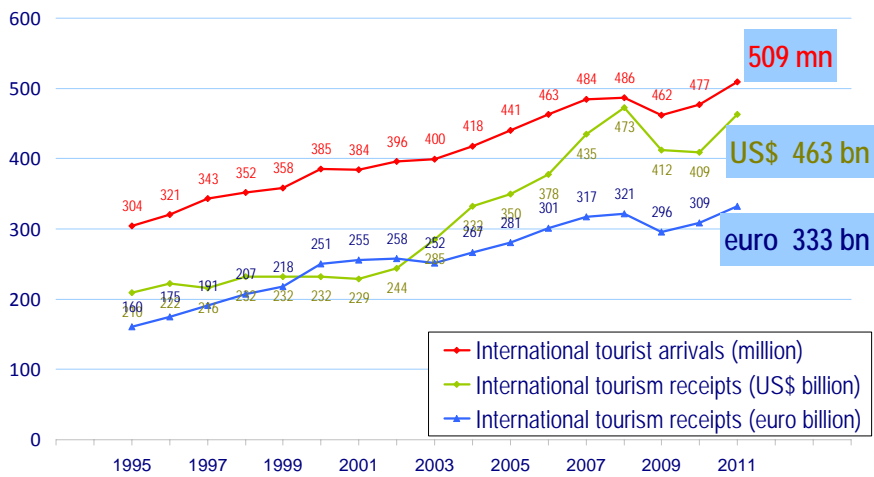


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## Inbound tourism: Europe 2011

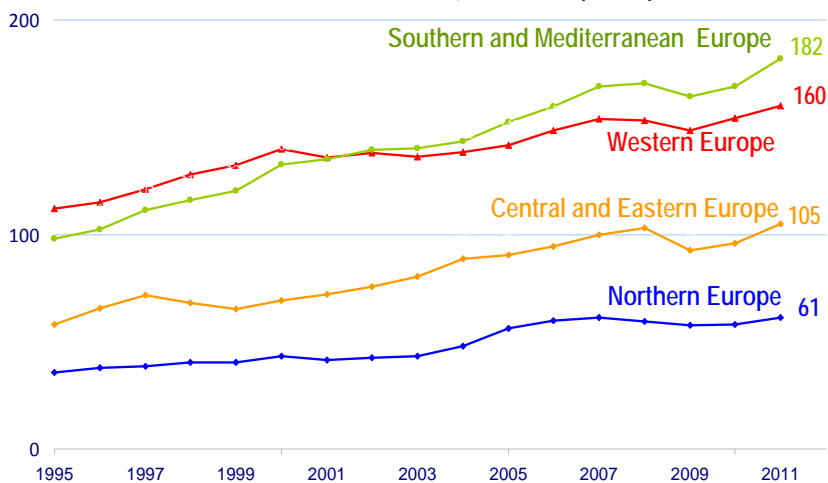
International tourist arrivals and receipts, 1995-2011



Source: World Tourism Organization (UNWTO)

## Europe 2011 Inbound tourism Growth in all sub regions

International tourist arrivals, 1995-2011\* (million)

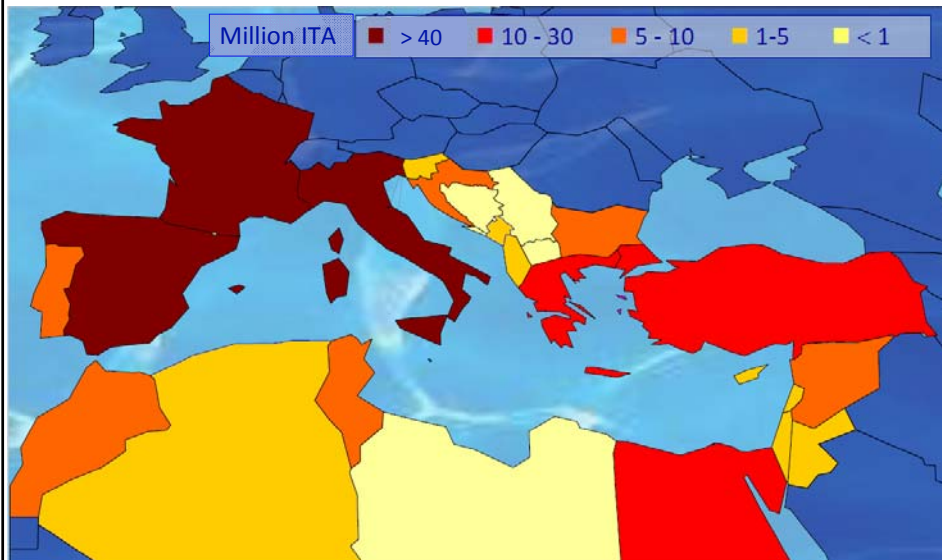


Source: World Tourism Organization (UNWTO)

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## International Tourism in the Mediterranean (2011)



Source: World Tourism Organization

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## International Tourism in the Mediterranean (2011)

**306 million**  
international tourist arrivals



- World's leading tourism destination in terms of international and domestic tourism.

**215 billion**  
euros in export earnings from international tourism



- One third of total arrivals worldwide
- Tourism is a major pillar of Mediterranean economies

**12%**  
of total exports

**10 million**  
new arrivals per year on average up to 2030

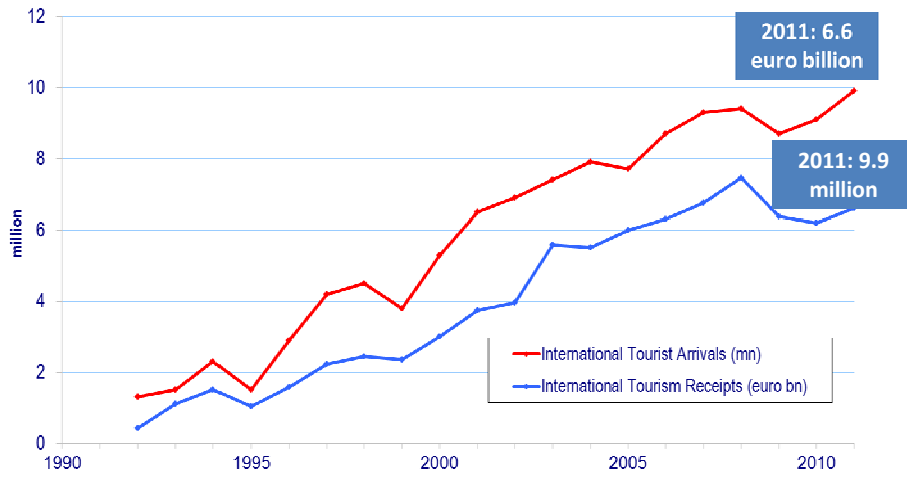


tourism



# Croatia

*International tourism 1992 – 2011*



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## Outlook 2012



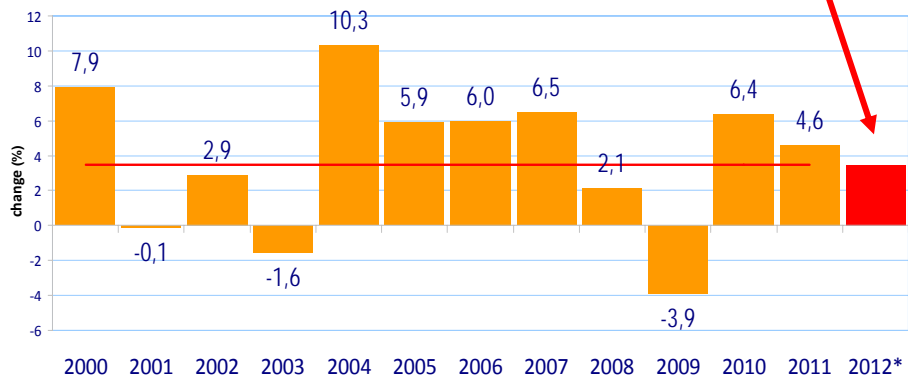


## Outlook: World

Forecast

2012: 3% to 4%

International tourist arrivals



Source: World Tourism Organization (UNWTO)

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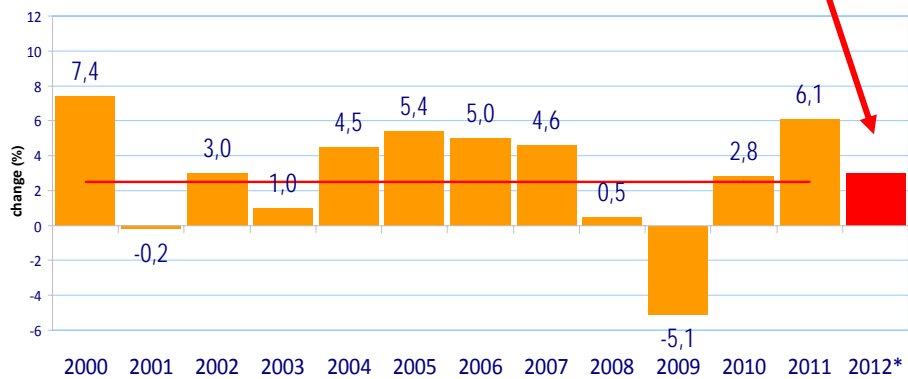


## Outlook: Europe

Forecast

2012: 2% to 4%

International tourist arrivals



Source: World Tourism Organization (UNWTO)

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## International tourism: projection full year 2012

	2011	Projection 2012
<b>World</b>	<b>+4.6%</b>	<b>+3% to +4%</b>
Europe	+6.1%	+2% to +4%
Asia and the Pacific	+6.1%	+4% to +6%
Americas	+4.2%	+2% to +4%
Africa	+0.8%	+4% to +6%
Middle East	-8.4%	+0% to +5%

Source: World Tourism Organization (UNWTO)

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**Tourism towards  
2030**



## Tourism 2020 Vision vs. actual trend - World

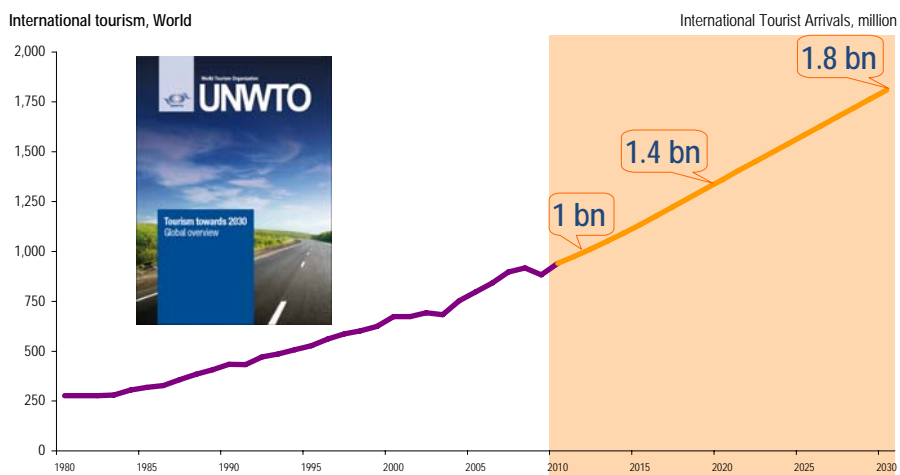


Source: World Tourism Organization (UNWTO)

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## International tourist arrivals to reach 1.8 billion by 2030



source: World Tourism Organization (UNWTO) ©

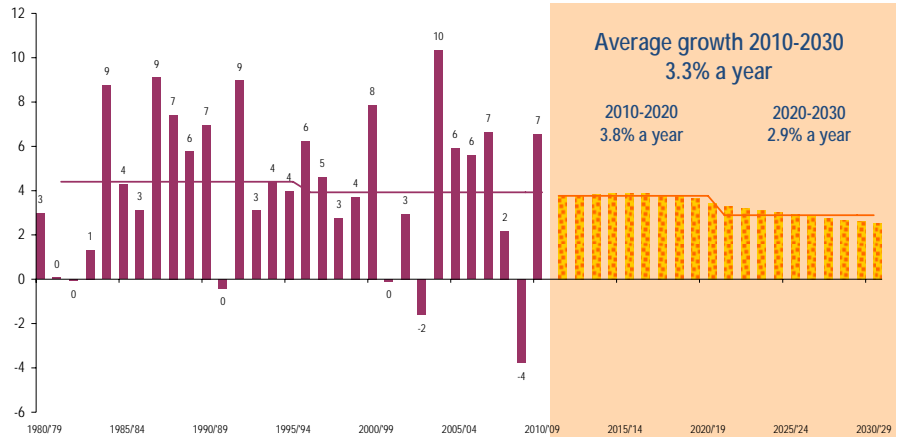
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## Growth in international tourism will continue, but at a more moderate pace

International tourism, World

International Tourist Arrivals, % change over previous year



Average growth 2010-2030  
3.3% a year

2010-2020  
3.8% a year

2020-2030  
2.9% a year

source: World Tourism Organization (UNWTO) ©

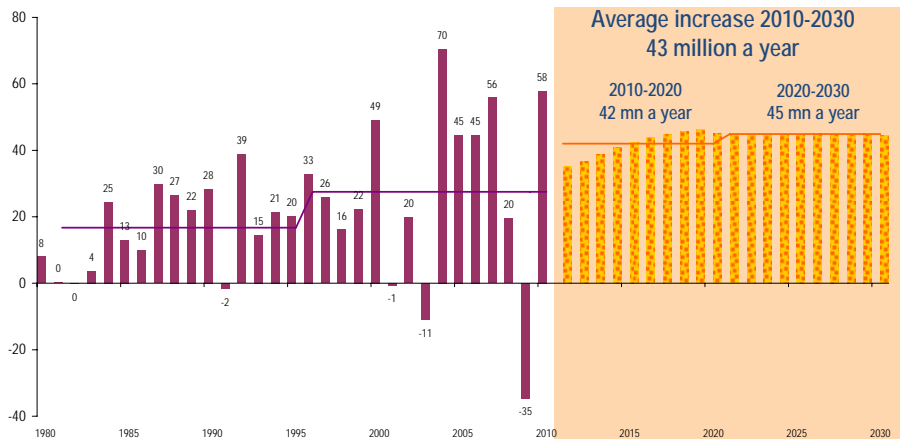
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## International tourist arrivals to increase by 43 million a year on average

International tourism, World

International Tourist Arrivals, absolute change over previous year, million



Average increase 2010-2030  
43 million a year

2010-2020  
42 mn a year

2020-2030  
45 mn a year

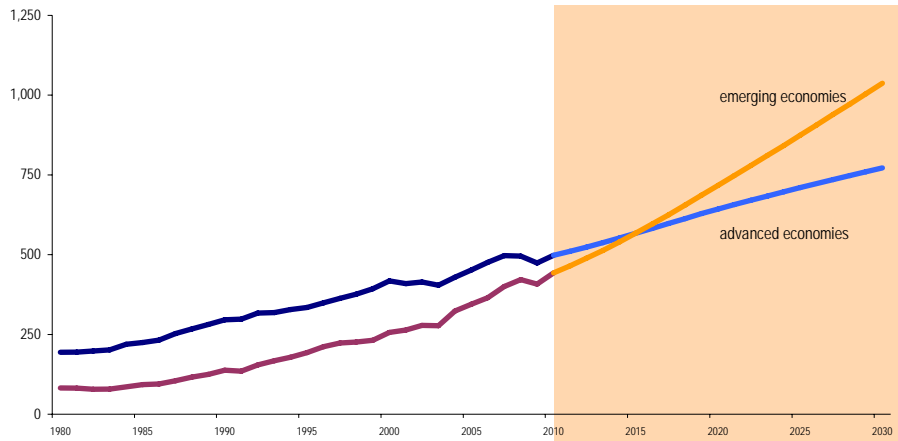
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## Emerging economy destinations to surpass advanced destinations in 2015

Inbound tourism, advanced and emerging economies

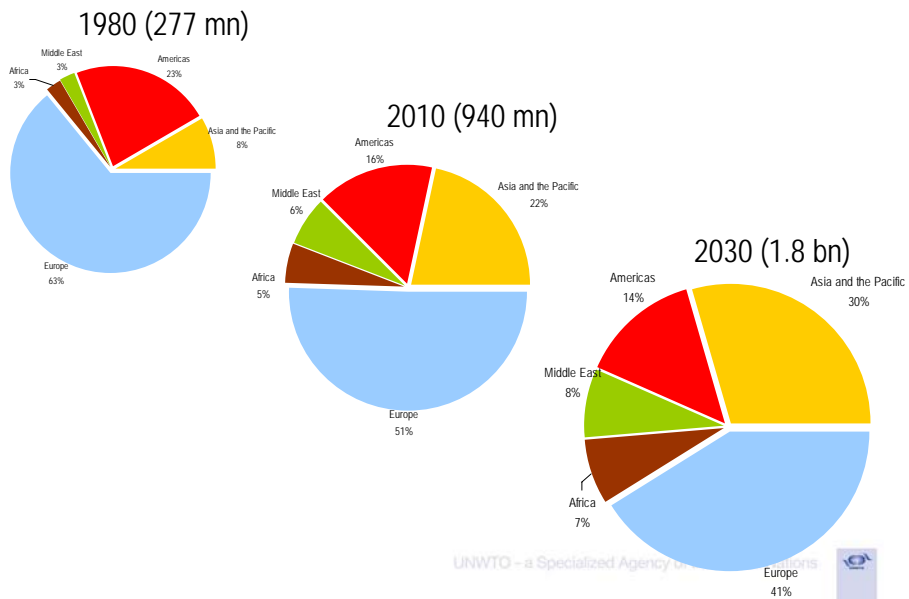


source: World Tourism Organization (UNWTO) ©

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## Asia and the Pacific, the Middle East and Africa to increase their shares



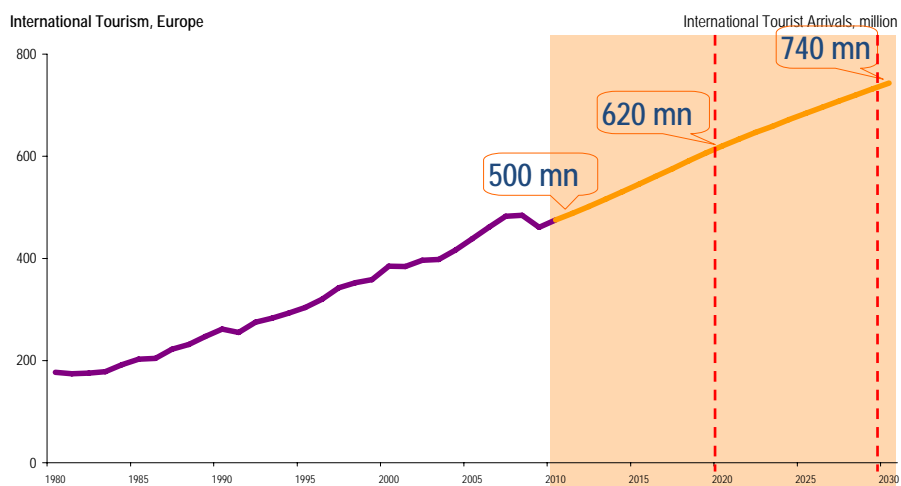
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## Europe towards 2030



## Europe: International tourist arrivals still to grow from 500 mn to almost 750 mn



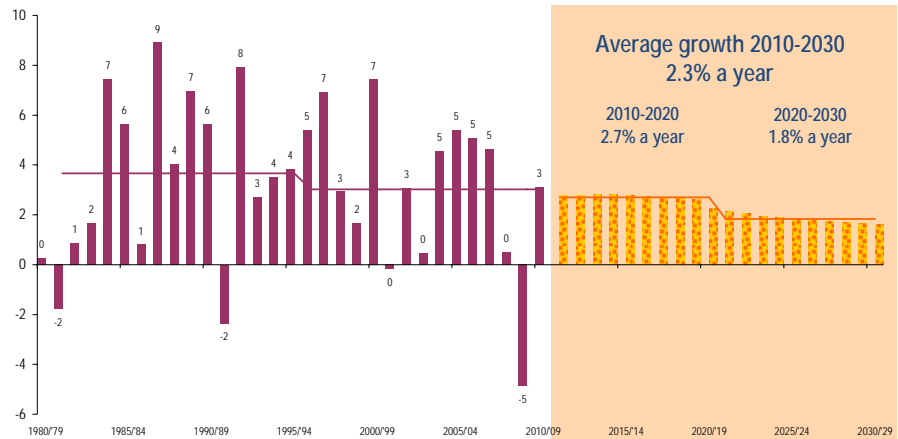
Source: World Tourism Organization (UNWTO) ©

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## Growth in international tourism will continue, but at a more moderate pace

International Tourism, Europe

International Tourist Arrivals, % change over previous year



Average growth 2010-2030  
2.3% a year

2010-2020  
2.7% a year

2020-2030  
1.8% a year

source: World Tourism Organization (UNWTO) ©

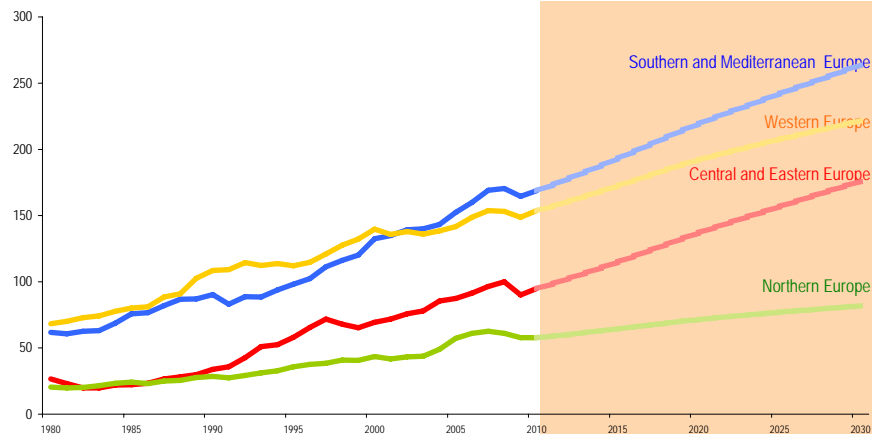
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## Europe by subregion

Europe: Inbound tourism by subregion of destination

International Tourist Arrivals, million



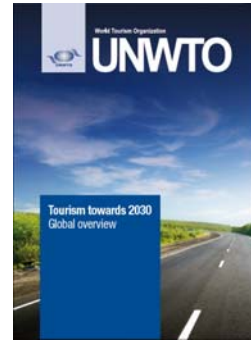
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## Tourism Towards 2030 - Summary

- Global growth in international tourist arrivals to continue, but at a more moderate pace, from 4.2% per year (1980–2020) to 3.3% (2010–2030), as a result of 4 factors:
  1. Higher Base volumes, so smaller increases still add substantial numbers
  2. Lower GDP growth, as economies mature
  3. Lower elasticity of travel to GDP
  4. Shift from falling transport costs to increasing ones
- Tourism Towards 2030 shows that there is still a substantial potential for further expansion in coming decades.
- Established as well as new destinations can benefit from this trend and opportunity.



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## Tourism Towards 2030 - Opportunities and challenges

### Key areas that mark the future:

- **Tourism** represents, for many countries, a **powerful tool for social and economic development and the reduction of poverty**, through the creation of jobs and enterprises, infrastructure development and the export revenues earned.
- **Sustainability** (social, economic and environmental): more important than ever, addressing issues such as energy dependency, climate change adaptation and mitigation, green economy, congestion management and risk management.
- **Long-term tourism** growth pattern: more moderate, sustainable and inclusive.



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## Green Tourism Scenario

- Investments in greener and sustainable tourism is a means to create jobs and reduce poverty while improving environmental outcomes.
- Green Investment in tourism (0,2% of global GDP) lead to significant resource conservation through efficiency improvement and reduction of losses.

### *The Green Tourism Scenario*

- **Total energy consumption** for tourism activities in **2050: 44% savings** in relation to BAU scenarios
- **CO2 emissions** will descend **-52%** by **2050** in relation to BAU.
- **Energy costs** in "Best practice" hotels **reduced from 6% to 2.5%** of annual turnover.
- Additional **employment** in energy, water, and waste services.
- Expansion of **local hiring** and sourcing.
- Reduced **water consumption** and **waste generation**.



**Thank you!**

**Luigi Cabrini**  
Director,  
Sustainable  
Development of  
Tourism - UNWTO

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