The Future Trends in Tourism - Global Perspectives

‚the future of TOURISM‘,

a Club of Amsterdam conference

31.05.2007, Amsterdam.

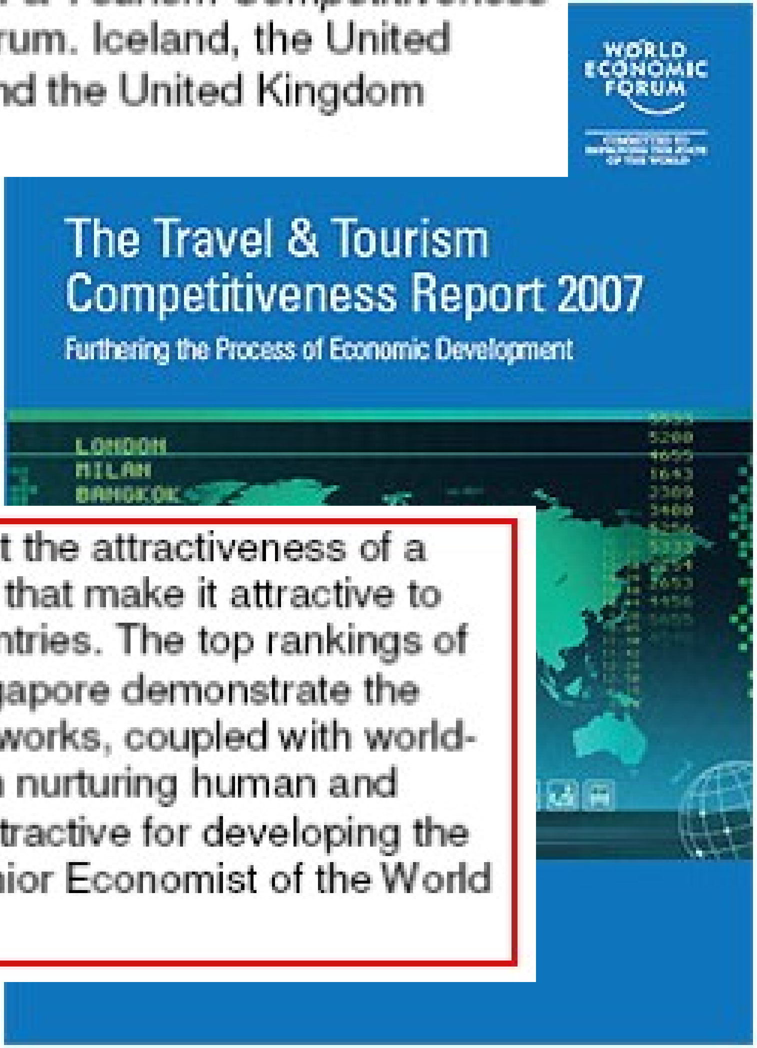
[A] Tourism - already a global competition

The current state:

facts & figures

The Future Trends in Tourism - Global Perspectives

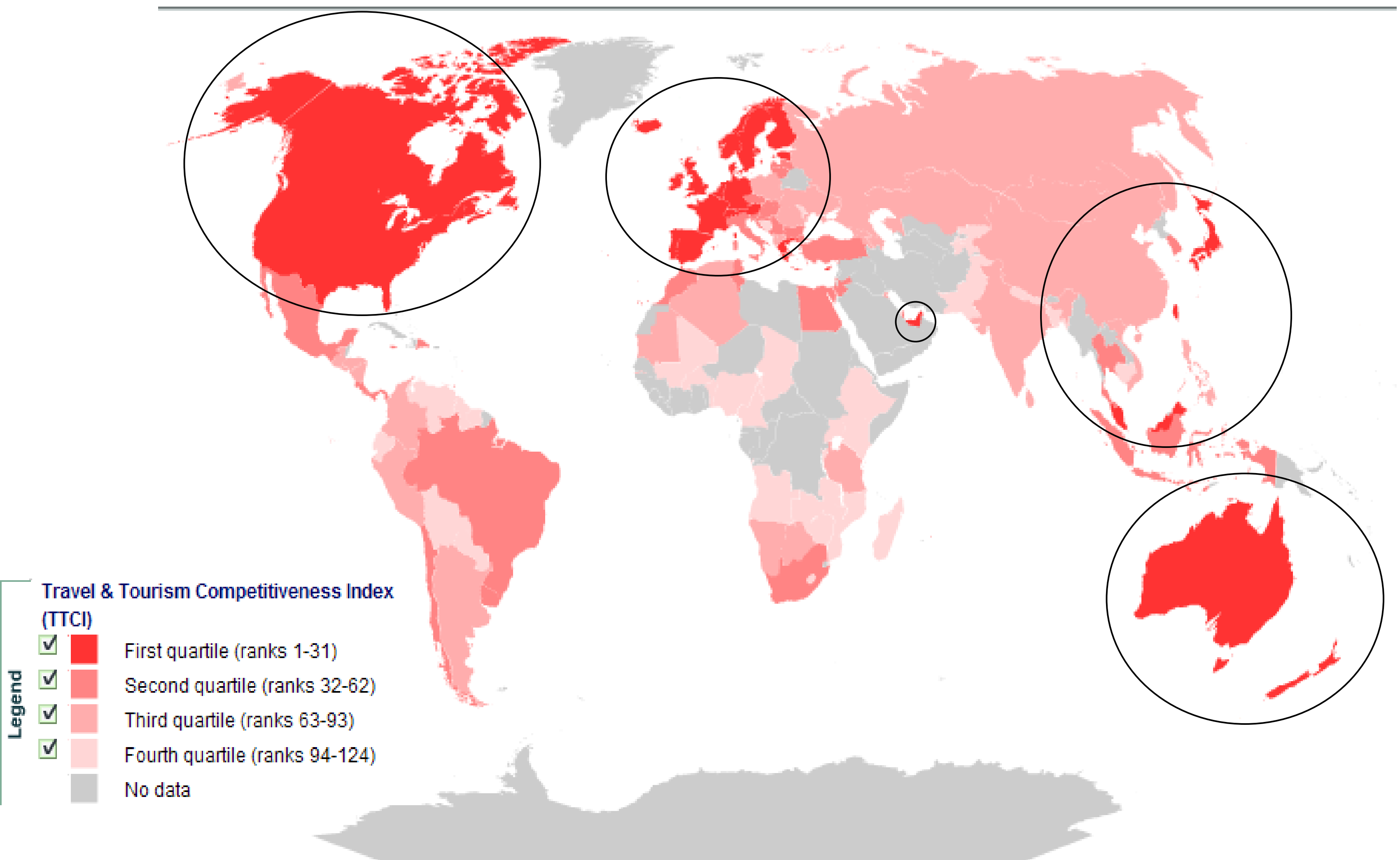
Geneva, Switzerland, 1 March 2007 – Switzerland, Austria and Germany have the most attractive environments for developing the travel and tourism industry, according to the very first ranking of its kind in the *Travel & Tourism Competitiveness Report 2007*, released today by the World Economic Forum. Iceland, the United States, Hong Kong, Canada, Singapore, Luxembourg and the United Kingdom complete the top ten list.



"Our study is not a 'beauty contest', or a statement about the attractiveness of a country. On the contrary, we aim to measure the factors that make it attractive to develop the travel and tourism industry of individual countries. The top rankings of Switzerland, Austria and Germany, Hong Kong and Singapore demonstrate the importance of supportive business and regulatory frameworks, coupled with world-class transport and tourism infrastructure and a focus on nurturing human and natural resources, for fostering an environment that is attractive for developing the travel & tourism (T&T) sector," said Jennifer Blanke, Senior Economist of the World Economic Forum's Global Competitiveness Network.

The Future Trends in Tourism - Global Perspectives

Travel and tourism competitiveness



Data provided by: World Economic Forum; copyright © Maplecroft.NET Limited 2007

Rank	Country/economy	Score
	Travel and Tourism Competitiveness Index	
1	Switzerland	5.66
2	Austria	5.54
3	Germany	5.48
4	Iceland	5.45
5	United States	5.43
6	Hong Kong SAR	5.33
7	Canada	5.31
8	Singapore	5.31
9	Luxembourg	5.31
10	United Kingdom	5.28
11	Denmark	5.27
12	France	5.23
13	Australia	5.21
14	New Zealand	5.20
15	Spain	5.18
16	Finland	5.16
17	Sweden	5.13
18	United Arab Emirates	5.09
19	Netherlands	5.08
20	Cyprus	5.07
21	Belgium	5.07
22	Portugal	5.05
23	Norway	5.04
24	Greece	4.99
25	Japan	4.99
26	Malta	4.96
27	Ireland	4.93
28	Estonia	4.90
29	Barbados	4.86
30	Taiwan, China	4.82
31	Malaysia	4.80
32	Israel	4.80
33	Italy	4.78
34	Tunisia	4.75
35	Czech Republic	4.75
36	Qatar	4.71
37	Slovak Republic	4.68
38	Croatia	4.66
39	Mauritius	4.63
40	Hungary	4.61
41	Costa Rica	4.60
42	Korea, Rep.	4.58

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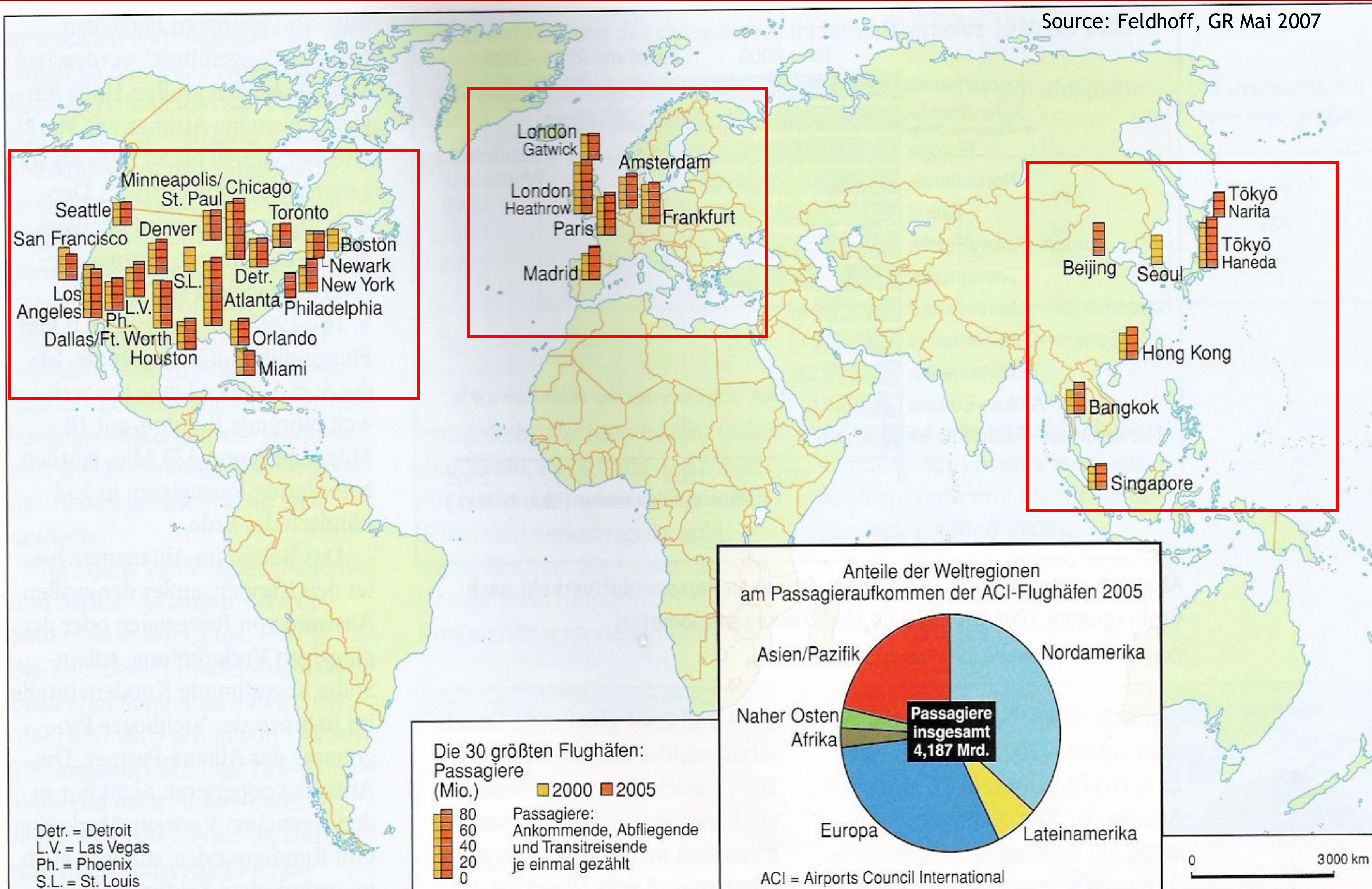
The Future Trends in Tourism - Global Perspectives

	International Tourist Arrivals (million)						Market share (%)	Change (%)		Average annual growth (%)
	1990	1995	2000	2003	2004	2005*	2005*	04/03	05*/04	00/05*
World	**439**	**540**	**687**	**694**	**764**	**806**	**100**	**10.1**	**5.5**	**3.3**
Europe	**265.6**	**315.0**	**395.8**	**407.1**	**424.4**	**441.5**	**54.8**	**4.3**	**4.0**	**2.2**
Northern Europe	31.6	40.1	45.8	45.8	49.6	52.9	6.6	8.4	6.5	2.9
Western Europe	108.6	112.2	139.7	136.1	139.0	142.7	17.7	2.2	2.6	0.4
Central/Eastern Europe	31.5	60.0	69.6	78.5	86.3	87.9	10.9	10.0	1.9	4.8
Southern/Mediter. Eu.	93.9	102.7	140.8	146.8	149.5	158.0	19.6	1.9	5.7	2.3
Asia and the Pacific	**56.2**	**82.4**	**110.5**	**113.3**	**144.2**	**155.4**	**19.3**	**27.3**	**7.8**	**7.1**
North-East Asia	26.4	41.3	58.3	61.7	79.4	87.6	10.9	28.6	10.3	8.5
South-East Asia	21.5	28.8	36.9	36.1	47.1	49.3	6.1	30.4	4.8	6.0
Oceania	5.2	8.1	9.2	9.0	10.1	10.5	1.3	12.1	3.8	2.6
South Asia	3.2	4.2	6.1	6.4	7.6	8.0	1.0	18.5	5.5	5.7
Americas	**92.8**	**109.0**	**128.1**	**113.1**	**125.7**	**133.5**	**16.6**	**11.1**	**6.2**	**0.8**
North America	71.7	80.7	91.4	77.3	85.7	89.9	11.2	10.9	4.9	-0.3
Caribbean	11.4	14.0	17.1	17.1	18.1	18.9	2.3	5.9	4.3	2.0
Central America	1.9	2.6	4.3	4.9	5.7	6.5	0.8	15.6	15.7	8.5
South America	7.7	11.7	15.3	13.8	16.2	18.2	2.3	17.2	12.2	3.6
Africa	**15.2**	**20.3**	**28.2**	**31.0**	**33.8**	**36.7**	**4.6**	**9.1**	**8.5**	**5.4**
North Africa	8.4	7.3	10.2	11.1	12.8	13.7	1.7	15.1	7.5	6.0
Subsaharan Africa	6.8	13.0	17.9	19.9	21.1	23.0	2.9	5.8	9.1	5.1
Middle East	**9.6**	**13.7**	**24.2**	**29.5**	**36.3**	**39.1**	**4.8**	**22.8**	**7.7**	**10.1**

Source: World Tourism Organization (UNWTO) © (Data as collected by UNWTO 2006)

The Future Trends in Tourism - Global Perspectives

Source: Feldhoff, GR Mai 2007



→ The World's Top-30-Airports (in terms of passenger traffic) and Share of World Regions

The future state:

forecasts & figures

[T1] Tourism Future - New Geographies

2005 - 2025:

Two Asian Decades

Source: WTTC 2007

ON A RELATIVE SCALE:

Countries expected to grow their Travel & Tourism Demand most rapidly between 2007 and 2017 are:

Travel & Tourism Demand 2007 - 2017 % Annualized Real Growth

1	China	9.1
2	Montenegro	8.6
3	India	7.9
4	Croatia	7.8
5	Dem Rep of the Congo	7.8
6	Vietnam	7.5
7	Romania	7.4
8	Namibia	7.1
9	Hong Kong	7.0
10	Chad	7.0

Asia‘s Future Tourism Tigers

Source: WTTC 2007

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8	Namibia	7.1
9	Hong Kong	7.0
10	Chad	7.0

ON AN ABSOLUTE SCALE:

Countries expected to generate the largest volume of Travel & Tourism Demand in 2017:

Travel & Tourism Demand 2007 - 2017 (US$ mn)

1	United States	3,067,977.0
2	China	1,571,015.0
3	Japan	981,437.6
4	Germany	744,910.7
5	United Kingdom	605,124.6
6	France	542,658.2
7	Spain	503,957.5
8	Italy	395,970.7
9	Russian Federation	324,352.7
10	Canada	311,412.6

Asia's Future Tourism Tiger

The Future Trends in Tourism - Global Perspectives

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8	Namibia	7.1
9	Hong Kong	7.0
10	Chad	7.0

ON AN EMPLOYMENT SCALE:

Countries expected to generate the largest amount (absolute terms) of Travel & Tourism Economy Employment in 2017:

Travel & Tourism Economy Employment 2017 ('000 of Jobs)

1	China	75,710.2
2	India	28,322
3	United States	16,125.9
4	Japan	9,422.7
5	Brazil	7,773.2
6	Indonesia	6,853.9
7	Mexico	5,469.2
8	Germany	4,962.8
9	Spain	4,858.5
10	Thailand	4,766.9

Asia's Future Tourism Tigers

ON AN ABSOLUTE SCALE:

Countries expected to generate ... 017:

3	Japan	981,437.6
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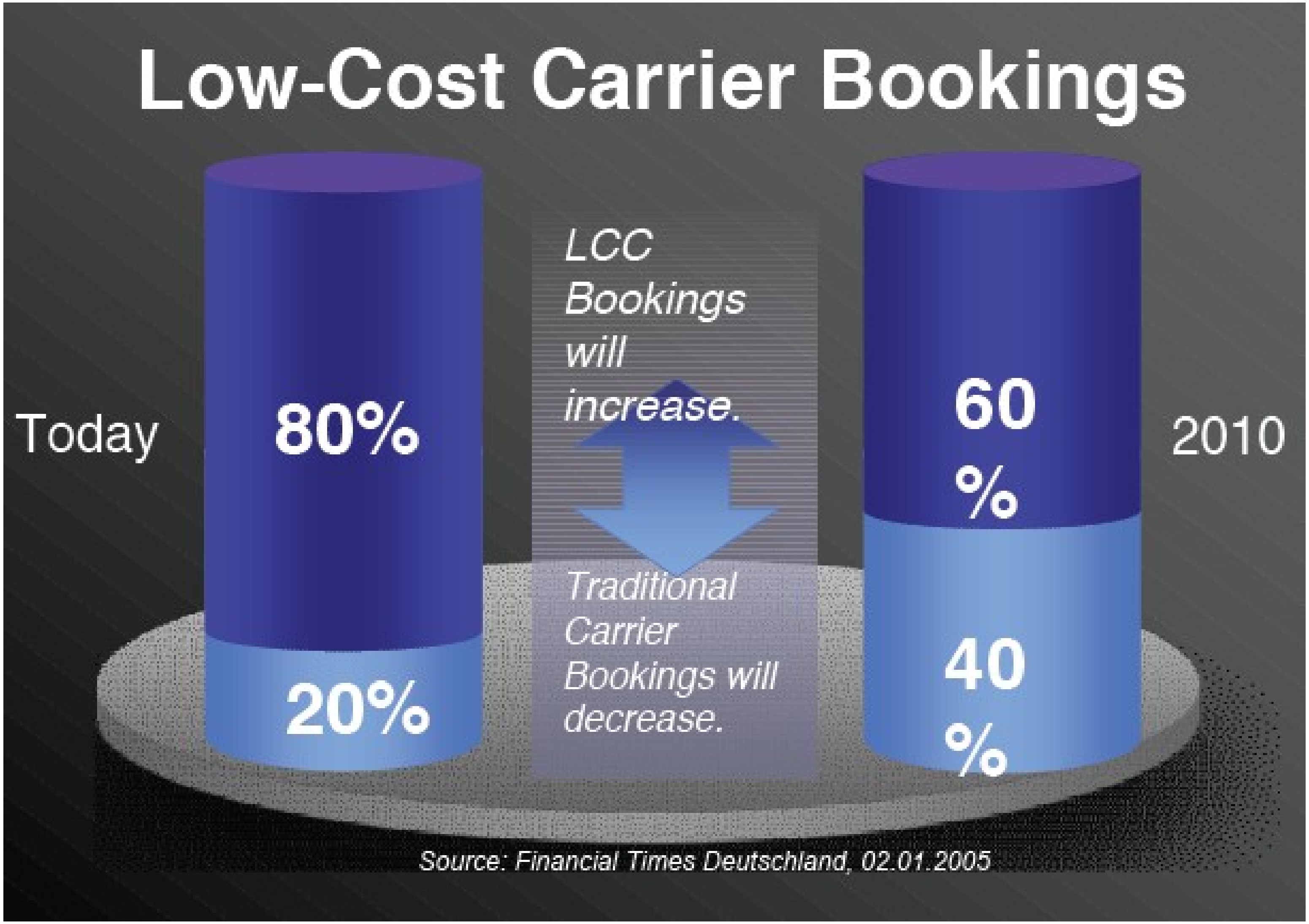
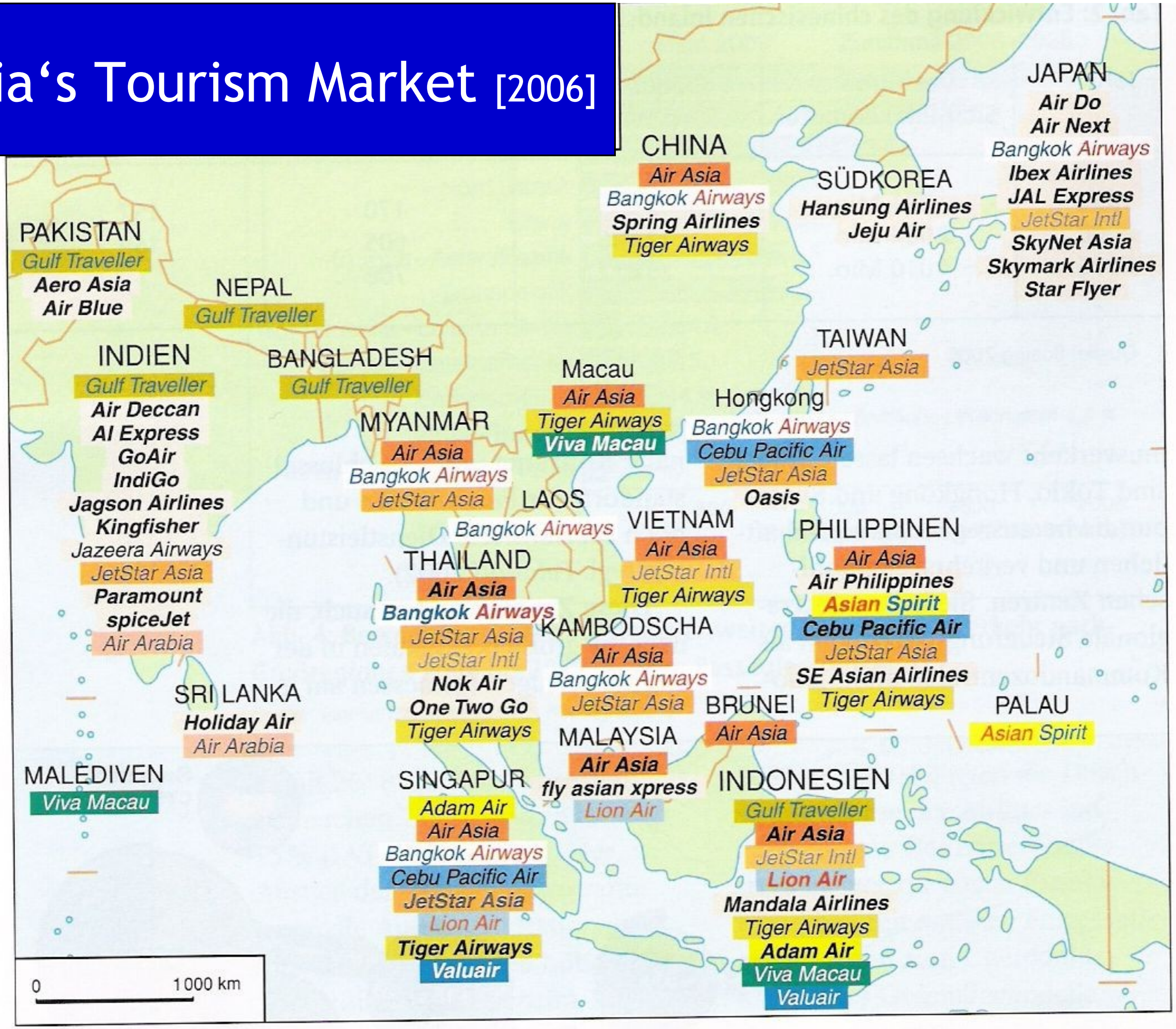

Low-Cost Carrier Bookings
Today
80%
20%
LCC Bookings will increase.
Traditional Carrier Bookings will decrease.
60 %
40 %
2010
Source: Financial Times Deutschland, 02.01.2005

LCC in Asia‘s Tourism Market [2006]



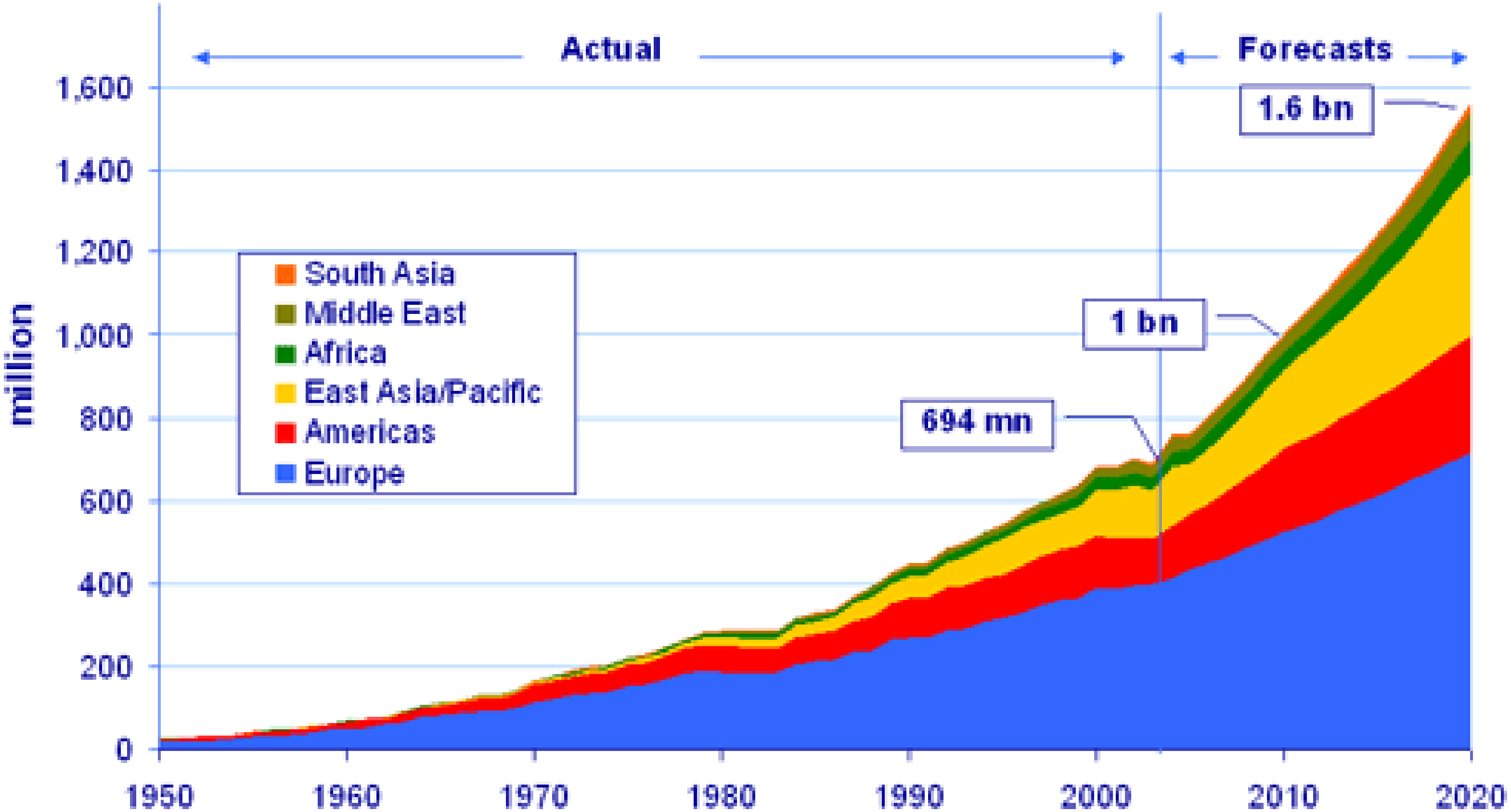
The Future Trends in Tourism - Global Perspectives

UNWTO's Tourism 2020 Vision [International Tourist Arrivals Forecast]

	Base Year 1995	Forecasts 2010	Forecasts 2020	Market share (%) 1995	Market share (%) 2020	Average annual growth rate (%) 1995-2020
	(Million)					
World	565	1006	1561	100	100	4.1
Africa	20	47	77	3.6	5.0	5.5
Americas	110	190	282	19.3	18.1	3.8
East Asia and the Pacific	81	195	397	14.4	25.4	6.5
Europe	336	527	717	59.8	45.9	3.1
Middle East	14	36	69	2.2	4.4	6.7
South Asia	4	11	19	0.7	1.2	6.2

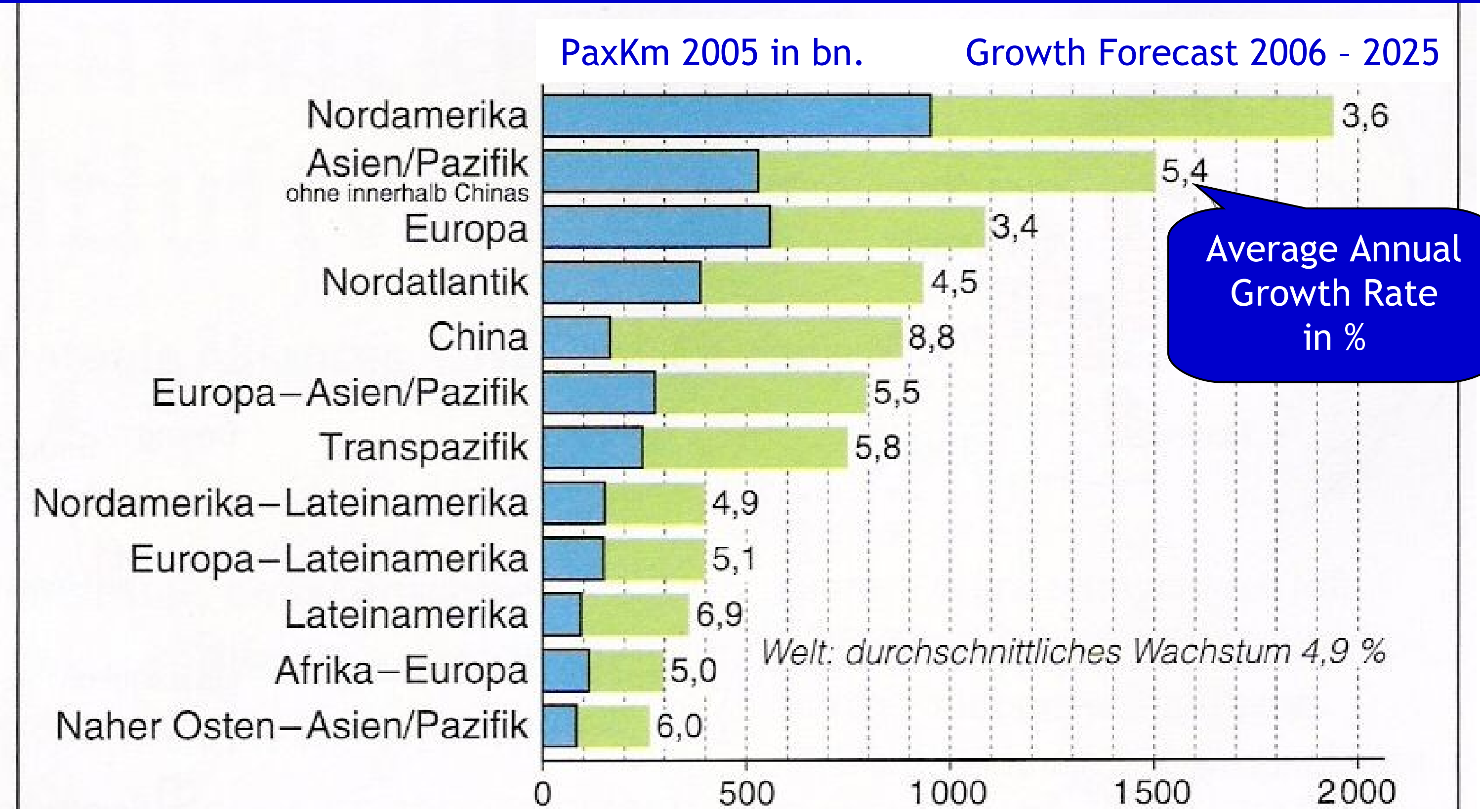
Source: UNWTO: http://www.unwto.org/facts/eng/vision.htm

UNWTO‘s Tourism 2020 Vision [Forecast]



UNWTO's *Tourism 2020 Vision* forecasts that international arrivals are expected to reach nearly 1.6 billion by the year 2020. Of these worldwide arrivals in 2020, 1.2 billion will be intraregional and 378 million will be long-haul travellers.

Passenger Traffic Growth Forecasts 2006 – 2025 in World Regions



Quelle: Feldhoff, GR Mai 2007

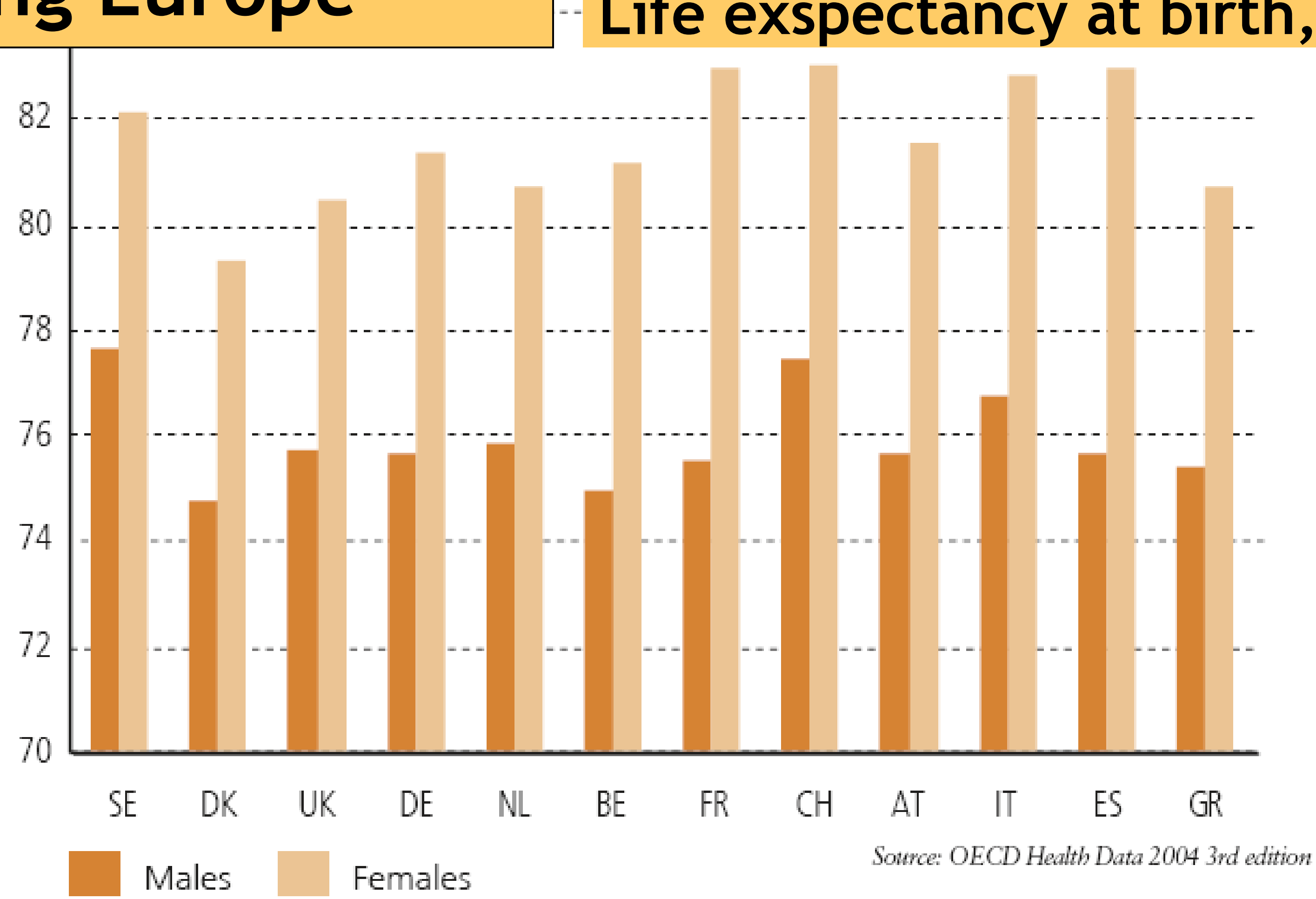
[T2] Tourism Future - „Ageing Europe“

Europe‘s New Burden -

Retirement Poverty

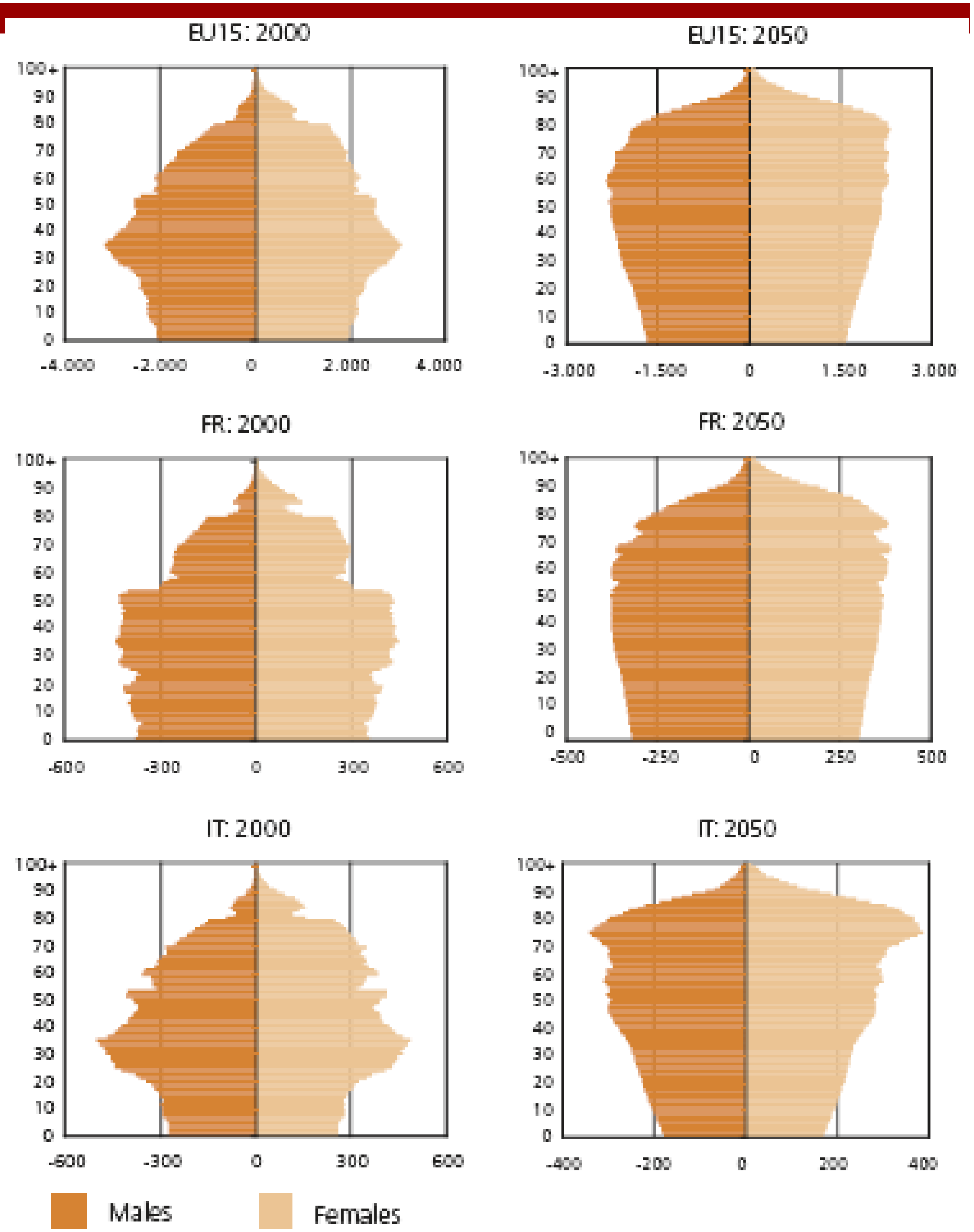
Tourism Future & Ageing Europe

Life exspectancy at birth, 2001



Tourism Future & Ageing Europe

Population Ageing in the EU, France and Italy, 2000-2050



Tourism Future & Ageing Europe

- Population Ageing
- Depopulation

  and
- Shrinking Cities

  [in EUROPE]

Facts:

- According to the United Nations, population ageing is increasingly becoming one of the most salient social, economic and demographic phenomena of our times.

- By 2030 the EU can expect 14 percent fewer workers and 7 percent fewer consumers as 2005

- By 2050, the number of people over 60 in Europe will reach 40% of the total population or 60% of the working age population.

Tourism Future & Ageing Europe

Population Ageing in the EU:

- Germany
- Belgium
- Denmark
- Spain
- France

Years 2000 / 2020 / 2050

Share of persons 60 years and over

[as a % of the total population; Source: Eurostat]

Germany:
2000: 22,9% - 2020: 30% - **2050: 41%**

Belgium:
2000: 22.1% - 2020: 30% - 2050: 38%

Denmark:
2000: 19.9% - 2020: 28% - 2050: 36%

Spain:
2000: 21.8% - 2020: 28% - **2050: 44%**

France:
2000: 20.7% - 2020: 29% - 2050: 38%

Tourism Future & Ageing Europe

- Population Ageing
- Depopulation

  and
- Shrinking Cities

  [in EUROPE]

Consequences:

- Shrinking Income
- Shrinking Consumption
- Skrinking Wealth

- Old Age Poverty &
- Social Exclusion

- Growing Health Risks &
- Long Term Health Problems

- Large Scale Immobilities &
- Neglected Space [Destinations]

Results from the SHARE-Project [http://www.share-project.org]

...clearly indicate that men and women with a lower socio-economic status have already a worse physical health than those with a higher socio-economic position

Among both men and women, a low educational level or income is associated with a higher risk of reporting less than good self-perceived health, long-term problems, as well as activity limitations due to health problems.

Consequences:

- Shrinking Income
- Shrinking Consumption
- Skrinking Wealth

- Old Age Poverty &
- Social Exclusion

- Growing Health Risks &
- Long Term Health Problems

- Large Scale Immobilities &
- Neglected Space [Destination]

Tourism Future & Ageing Europe

- Population Ageing
- Depopulation

  and
- Shrinking Cities

  [in EUROPE]

Consequences:

- Shrinking Income

Discussed Solution:

New Migrant Workers:

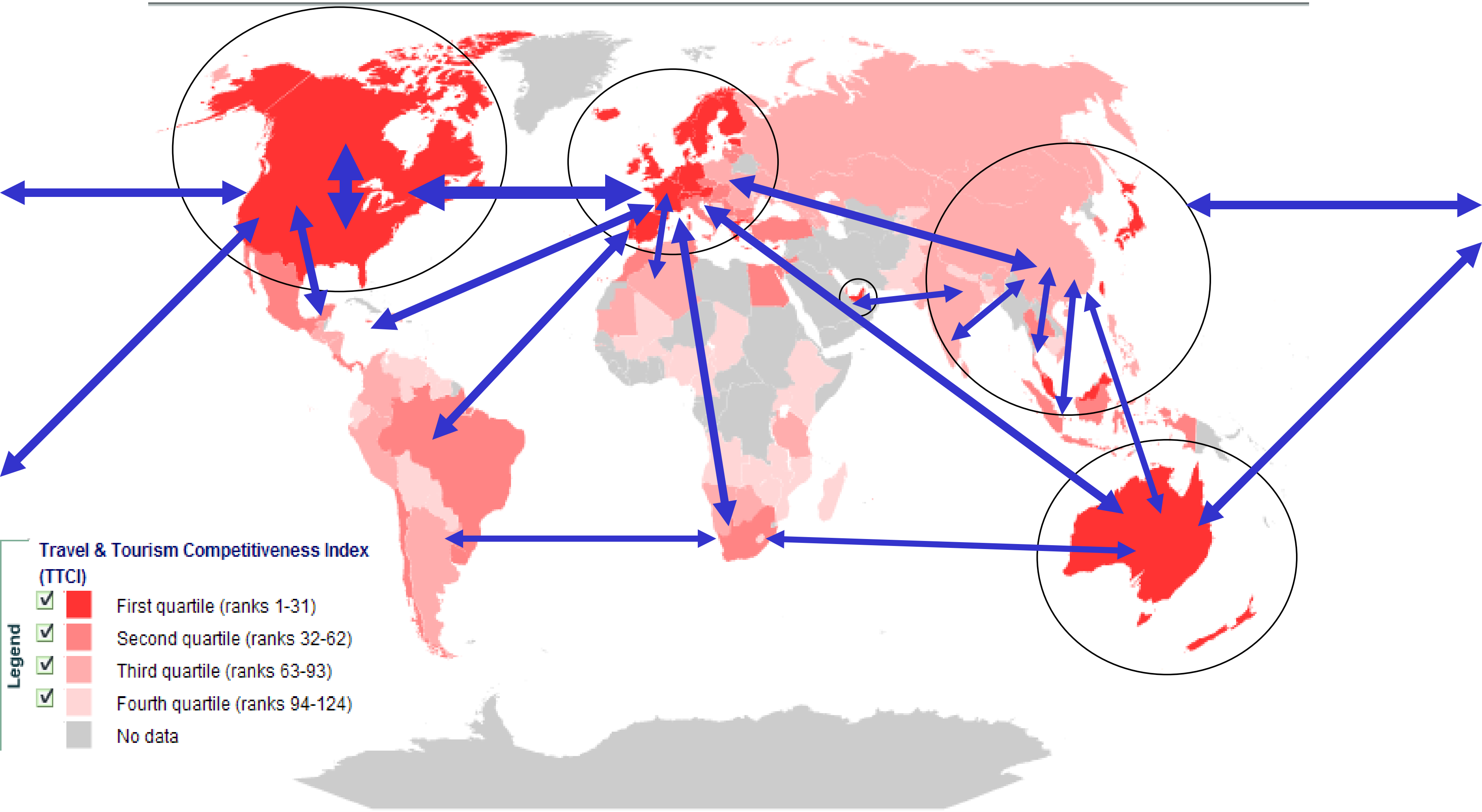
80–700 million migrants by 2050!

A sustainable increase of VFR-Tourism shall follow!

[T3] Tourism Future - „VFR-Tourism“

„CU soon, my friend/brother“ - Global VFR-Tourism Streams

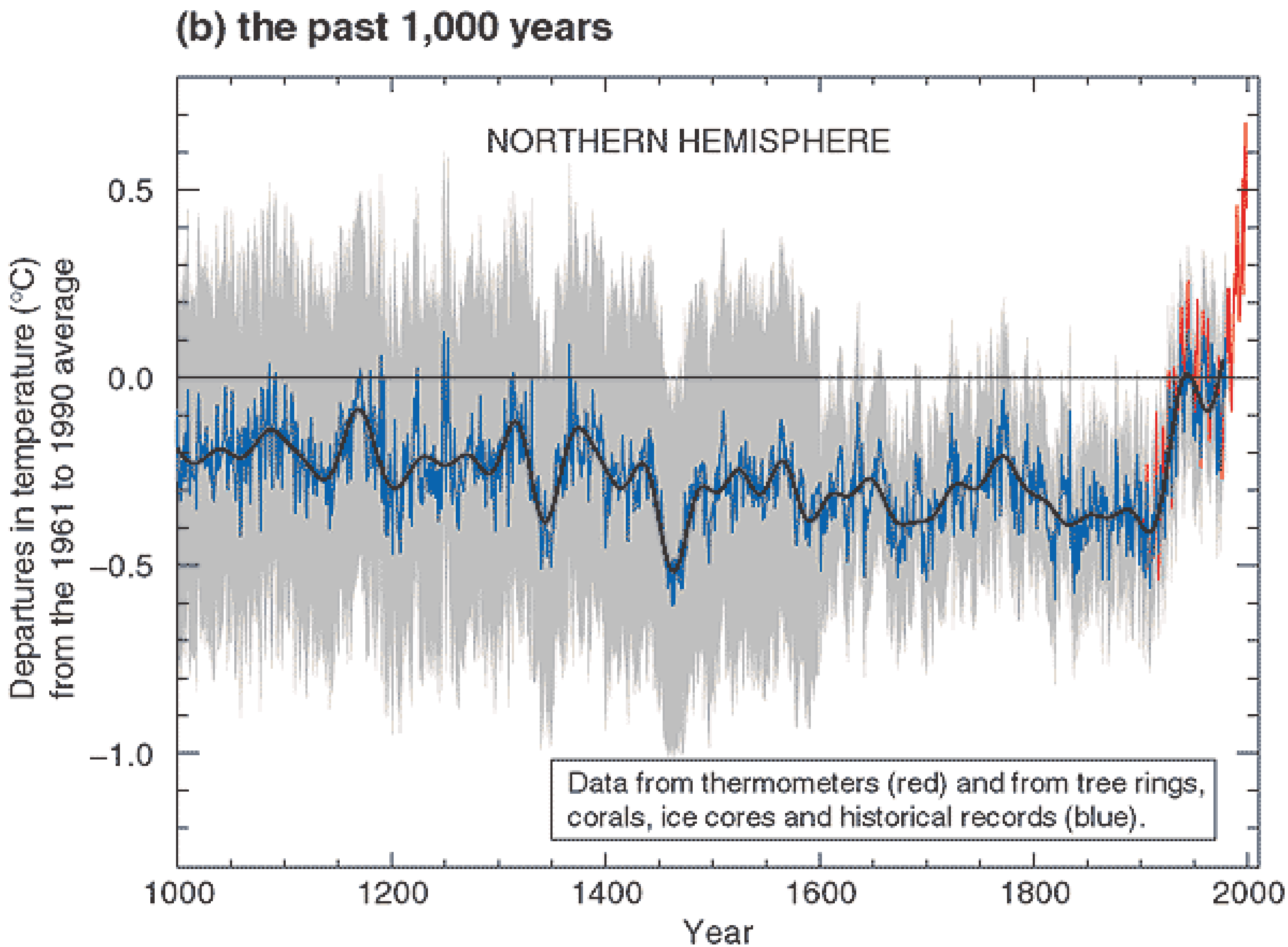
The Sustainable VFR-Tourism Trend in World Tourism



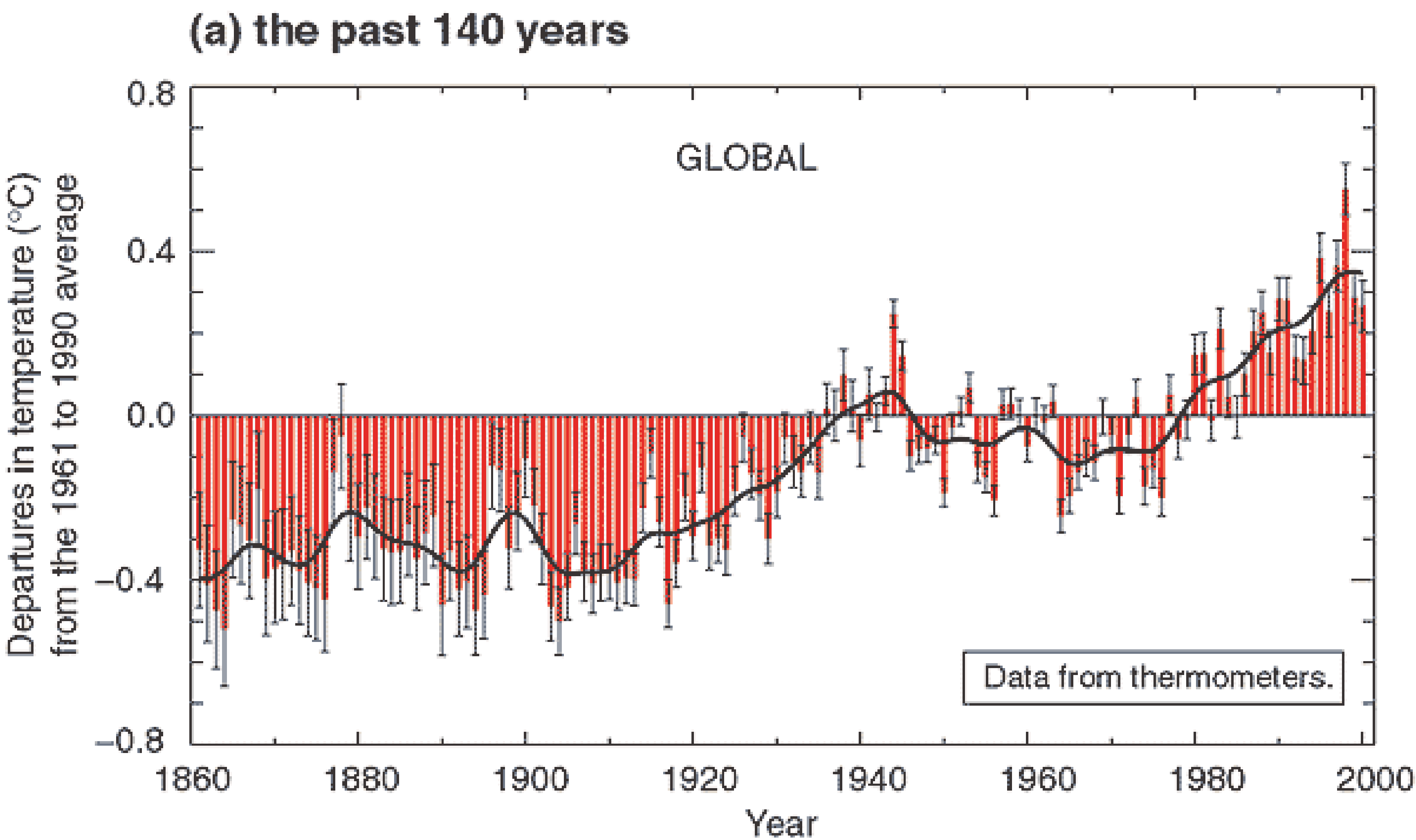
[T4] Tourism Future & Climate Change

„The *Mediterranization* of Western- and Central-Europe“ - Climate Change Advantages [?]

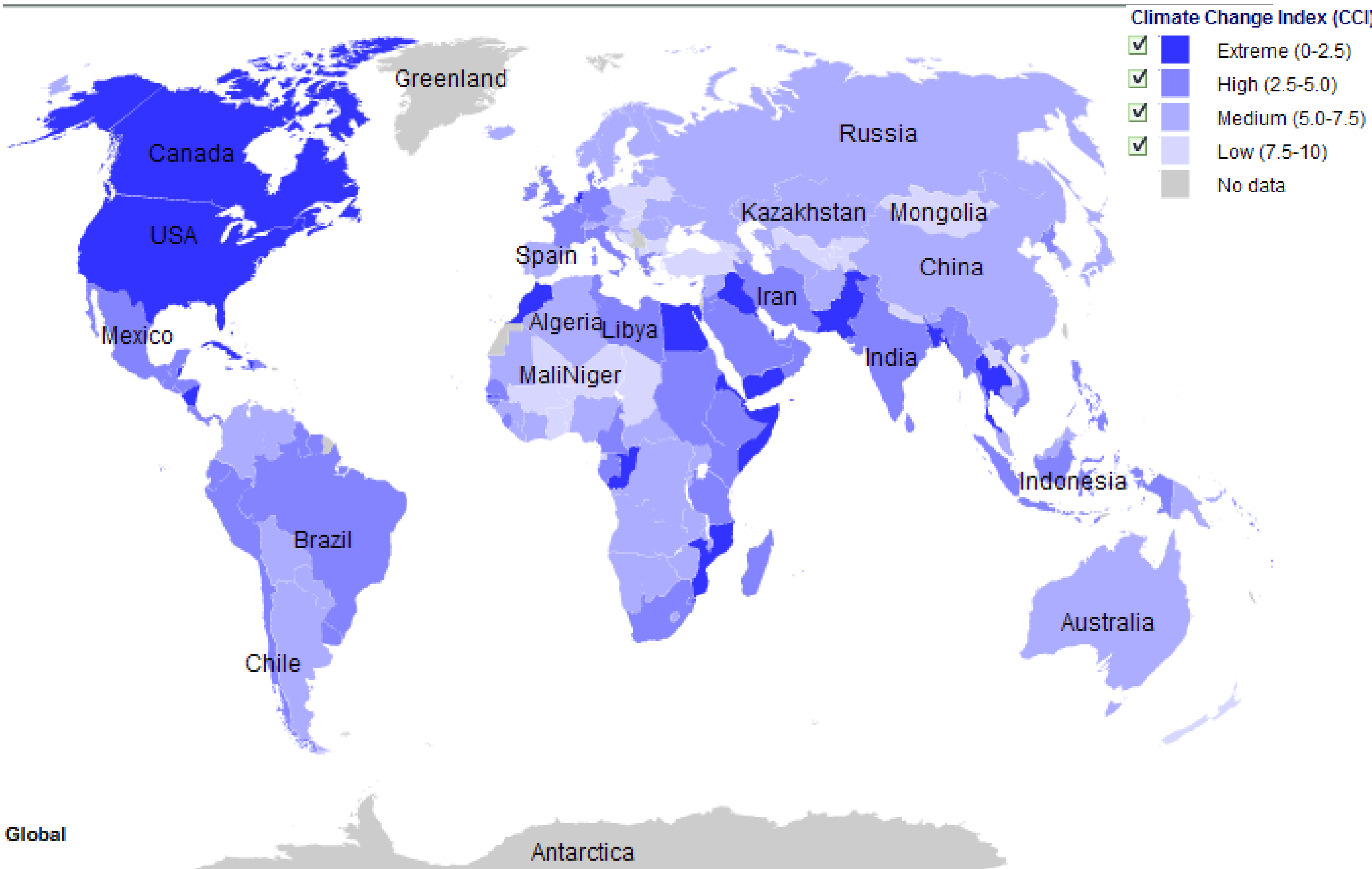
IPCC-Data: Variations of the Earth's surface temperature for:



IPCC-Data: Variations of the Earth's surface temperature for...

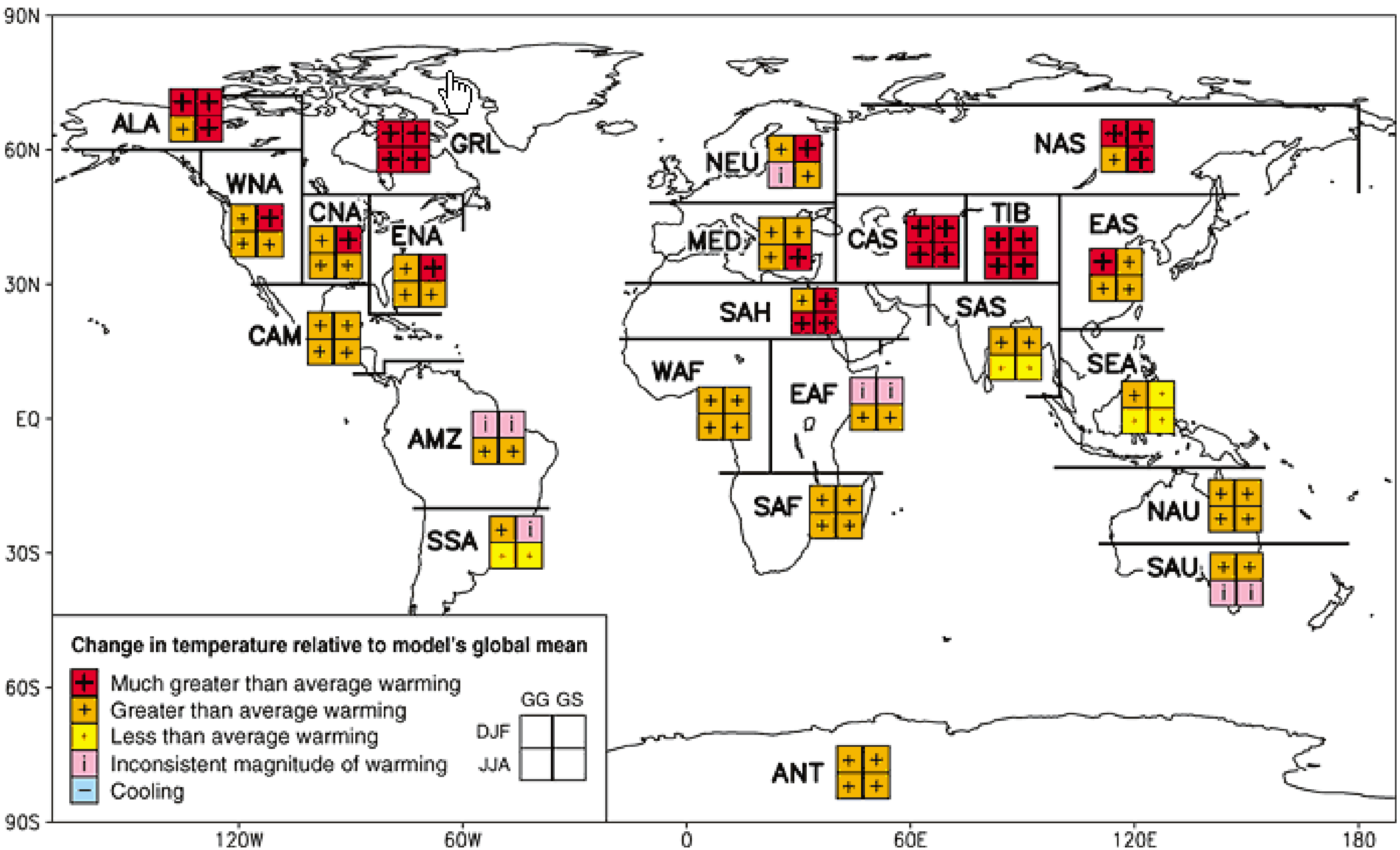


Global map of climate change 2006



Data provided by: World Economic Forum; copyright © Maplecroft.NET Limited 2007

IPCC-Data: Regional Warming [inter-modell consistancy]



The Future Trends in Tourism - Global Perspectives

North Amerika

Europe

Summary of climate changes and their probable impact on major international travel flows

MAJOR TOURISM FLOW	ORIGIN MARKET CLIMATE CHANGE	DESTINATION REGION CLIMATE CHANGE	IMPLICATIONS FOR DESTINATION REGION	POSSIBLE MARKET REACTIONS
NORTHERN EUROPE TO MEDITERRANEAN	- Much warmer, wetter winters - Warmer, drier summers - More "reliable" summers	- Warmer, wetter winters - Much warmer, drier summers - Changes more marked in Eastern Mediterranean - Increased heat index - More days above 40°C - More arid landscape - Small tidal range means greater sea level rise impact	- Greater drought and fire risk - Increased water shortages - Greater personal heat stress - Beach degradation and habitat loss due to sea level rises - Vulnerability to more tropical diseases (eg malaria) - More flash floods - Poor urban air quality in cities	*Overwhelmingly a leisure travel market* - Improvement of Northern European summers triggers more domestic holidays - Decreased incentive for Mediterranean summer holidays - Increased incentive for shoulder month Mediterranean holidays - Increased incentive for southerners to go north
NORTH AMERICA TO EUROPE	- Warmer winters - Warmer summers - Slight rainfall increases - S.E. USA (Florida) at risk from beach erosion, greater storm risk - Pacific coast greater storm risk and higher rainfall	**Northern Europe** - Much warmer, wetter winters - Warmer, drier summers - More "reliable" summers **Southern Europe** - Warmer, wetter winters - Much warmer, drier summers - E. Med. esp. sharp changes - Increased heat index - More days above 40°C - Sea level rises	**Northern Europe** *(80% of flow is to this sub- region)* - More attractive climate for summer holidays - Possibly greater congestion at key sites and cities **Southern Europe** *(20% of flow is to this sub-region)* - Greater drought risk - Increased water shortages - Greater fire risk - More beach degradation due to sea level rises	*Approx. 70% leisure, 30% business* - Too hot for peak summer cultural visits to southern Europe; - Shoulder months travel may increase - Little change foreseen for travel to northern Europe
EUROPE TO NORTH AMERICA	**Northern Europe** - Much warmer, wetter winters - Warmer, drier summers - More "reliable" summers **Southern Europe** - Warmer, wetter winters - Much warmer, drier summers - E. Med. esp. sharp changes - Increased heat index - More days above 40°C	- Warmer winters - Warmer summers - Slight rainfall increases - S.E. USA (Florida) at risk from beach erosion, greater storm risk - Pacific coast greater storm risk and higher rainfall	- Sea level rise damages Florida coast and Everglades - Risk of Pacific coastal damage - Geomorphic damage to south-eastern coast - Increased heat index - Coastal erosion and storm damage risk on east coast - Rising health costs as tropical disease risk rises	*Biggest destinations are Florida, California and New York* - Florida may become less attractive at peak times - Possibly greater attraction of Carolina coast? - E. coast US and Canadian cities too hot in summer - Stronger winter ski market due to reduced capacity in Europe

Source: Travel Research International 2002/2006

The Future Trends in Tourism - Global Perspectives

North Amerika | Europe

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NORTHERN EUROPE TO MEDITERRANEAN	- Much warmer, wetter winters - Warmer, drier summers - More "reliable" summers	- Warmer, wetter winters - Much warmer, drier summers - Changes more marked in Eastern Mediterranean - Increased heat index - More days above 40°C - More arid landscape - Small tidal range means greater sea level rise impact	- Greater drought and fire risk - Increased water shortages - Greater personal heat stress - Beach degradation and habitat loss due to sea level rises - Vulnerability to more tropical diseases (eg malaria) - More flash floods - Poor urban air quality in cities	*Overwhelmingly a leisure travel market* - Improvement of Northern European summers triggers more domestic holidays - Decreased incentive for Mediterranean summer holidays - Increased incentive for shoulder month Mediterranean holidays - Increased incentive for southerners to go north
NORTH AMERICA TO EUROPE	- Warmer winters - Warmer summers - Slight rainfall increases - S.E. USA (Florida) at risk from beach erosion, greater storm risk - Pacific coast greater storm risk and higher rainfall	**Northern Europe** - Much warmer, wetter winters - Warmer, drier summers - More "reliable" summers **Southern Europe** - Warmer, wetter winters - Much warmer, drier summers - E. Med. esp. sharp changes - Increased heat index - More days above 40°C - Sea level rises	**Northern Europe** *(80% of flow is to this sub- region)* - More attractive climate for summer holidays - Possibly greater congestion at key sites and cities **Southern Europe** *(20% of flow is to this sub-region)* - Greater drought risk - Increased water shortages - Greater fire risk - More beach degradation due to sea level rises	*Approx. 70% leisure, 30% business* - Too hot for peak summer cultural visits to southern Europe; - Shoulder months travel may increase - Little change foreseen for travel to northern Europe
EUROPE TO NORTH AMERICA	**Northern Europe** - Much warmer, wetter winters - Warmer, drier summers - More "reliable" summers **Southern Europe** - Warmer, wetter winters - Much warmer, drier summers - E. Med. esp. sharp changes - Increased heat index - More days above 40°C	- Warmer winters - Warmer summers - Slight rainfall increases - S.E. USA (Florida) at risk from beach erosion, greater storm risk - Pacific coast greater storm risk and higher rainfall	- Sea level rise damages Florida coast and Everglades - Risk of Pacific coastal damage - Geomorphic damage to south-eastern coast - Increased heat index - Coastal erosion and storm damage risk on east coast - Rising health costs as tropical disease risk rises	*Biggest destinations are Florida, California and New York* - Florida may become less attractive at peak times - Possibly greater attraction of Carolina coast? - E. coast US and Canadian cities too hot in summer - Stronger winter ski market due to reduced capacity in Europe

Source: Travel Research International 2002/2006

The Future Trends in Tourism - Global Perspectives

North Amerika ⟷ Europe

Summary of climate changes and their probable impact on major international travel flows

MAJOR TOURISM FLOW	ORIGIN MARKET CLIMATE CHANGE	DESTINATION REGION CLIMATE CHANGE	IMPLICATIONS FOR DESTINATION REGION	POSSIBLE MARKET REACTIONS
NORTHERN EUROPE TO MEDITERRANEAN	- Much warmer, wetter winters - Warmer, drier summers - More "reliable" summers	- Warmer, wetter winters - Much warmer, drier summers - Changes more marked in Eastern Mediterranean - Increased heat index - More days above 40°C - More arid landscape - Small tidal range means greater sea level rise impact	- Greater drought and fire risk - Increased water shortages - Greater personal heat stress - Beach degradation and habitat loss due to sea level rises - Vulnerability to more tropical diseases (eg malaria) - More flash floods - Poor urban air quality in cities	*Overwhelmingly a leisure travel market* - Improvement of Northern European summers triggers more domestic holidays - Decreased incentive for Mediterranean summer holidays - Increased incentive for shoulder month Mediterranean holidays - Increased incentive for southerners to go north
NORTH AMERICA TO EUROPE	- Warmer winters - Warmer summers - Slight rainfall increases - S.E. USA (Florida) at risk from beach erosion, greater storm risk - Pacific coast greater storm risk and higher rainfall	**Northern Europe** - Much warmer, wetter winters - Warmer, drier summers - More "reliable" summers **Southern Europe** - Warmer, wetter winters - Much warmer, drier summers - E. Med. esp. sharp changes - Increased heat index - More days above 40°C - Sea level rises	**Northern Europe** *(80% of flow is to this sub- region)* - More attractive climate for summer holidays - Possibly greater congestion at key sites and cities **Southern Europe** *(20% of flow is to this sub-region)* - Greater drought risk - Increased water shortages - Greater fire risk - More beach degradation due to sea level rises	*Approx. 70% leisure, 30% business* - Too hot for peak summer cultural visits to southern Europe; - Shoulder months travel may increase - Little change foreseen for travel to northern Europe
EUROPE TO NORTH AMERICA	**Northern Europe** - Much warmer, wetter winters - Warmer, drier summers - More "reliable" summers **Southern Europe** - Warmer, wetter winters - Much warmer, drier summers - E. Med. esp. sharp changes - Increased heat index - More days above 40°C	- Warmer winters - Warmer summers - Slight rainfall increases - S.E. USA (Florida) at risk from beach erosion, greater storm risk - Pacific coast greater storm risk and higher rainfall	- Sea level rise damages Florida coast and Everglades - Risk of Pacific coastal damage - Geomorphic damage to south-eastern coast - Increased heat index - Coastal erosion and storm damage risk on east coast - Rising health costs as tropical disease risk rises	*Biggest destinations are Florida, California and New York* - Florida may become less attractive at peak times - Possibly greater attraction of Carolina coast? - E. coast US and Canadian cities too hot in summer - Stronger winter ski market due to reduced capacity in Europe

Source: Travel Research International 2002/2006

The Future Trends in Tourism - Global Perspectives

Caribbean ⟷ North America ⟷ North-East-Asia

Source: Travel Research International 2002/2006

MAJOR TOURISM FLOW	ORIGIN MARKET CLIMATE CHANGE	DESTINATION REGION CLIMATE CHANGE	IMPLICATIONS FOR DESTINATION REGION	POSSIBLE MARKET REACTIONS
NORTH EAST ASIA TO SOUTH EAST ASIA	- Warmer all year round - Small year round rainfall increase	- Little change in rainfall - Relatively little change in temperatures - Coastal areas vulnerable to sea levels rises	- No dramatic climatic changes foreseen - Islands and tourist coasts vulnerable - Coral bleaching	- Climatic factors unlikely to influence travel patterns greatly - Possible decline in dive and beach markets
NORTH EAST ASIA TO NORTH AMERICA	- Warmer all year round - Small year round rainfall increase	- Warmer winters - Warmer summers - Slight rainfall increases - Pacific coast greater storm risk and higher rainfall	- Risk of Pacific coastal damage - Geomorphic damage to south-eastern coast - Increased heat index - Coastal erosion and storm damage risk on east coast	- E. coast US and Canadian cities too hot in summer? - Sightseeing travel not likely to be greatly affected by climate change
NORTH AMERICA TO CARIBBEAN	- Warmer winters - Warmer summers - Slight rainfall increases - S.E. USA (Florida) at risk from beach erosion, greater storm risk - Pacific coast greater storm risk and higher rainfall	- Warmer winters - Warmer summers - Small decrease in rainfall - Sea level rises	- Particularly vulnerable to sea level rises - Increased beach erosion - Coral bleaching and reef damage - Salinisation of aquifers - Higher energy costs for air conditioning - Greater need for sea defences and flood control - More tropical diseases (eg malaria) - Increased pressure on natural resources and eco-systems	- Beach product offering becomes less attractive (heat index, beach erosion, sea and coral quality) - Less need to escape northern climate - Loss of confidence in destination health risks

Source: Travel Research International

The Future Trends in Tourism - Global Perspectives

Caribbean ⟷ North America ⟷ North-East-Asia

Source: Travel Research International 2002/2006

MAJOR TOURISM FLOW	ORIGIN MARKET CLIMATE CHANGE	DESTINATION REGION CLIMATE CHANGE	IMPLICATIONS FOR DESTINATION REGION	POSSIBLE MARKET REACTIONS
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NORTH EAST ASIA TO NORTH AMERICA	- Warmer all year round - Small year round rainfall increase	- Warmer winters - Warmer summers - Slight rainfall increases - Pacific coast greater storm risk and higher rainfall	- Risk of Pacific coastal damage - Geomorphic damage to south-eastern coast - Increased heat index - Coastal erosion and storm damage risk on east coast	- E. coast US and Canadian cities too hot in summer? - Sightseeing travel not likely to be greatly affected by climate change
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Source: Travel Research International

The Future Trends in Tourism - Global Perspectives

Caribbean ⟷ North America ⟷ North-East-Asia

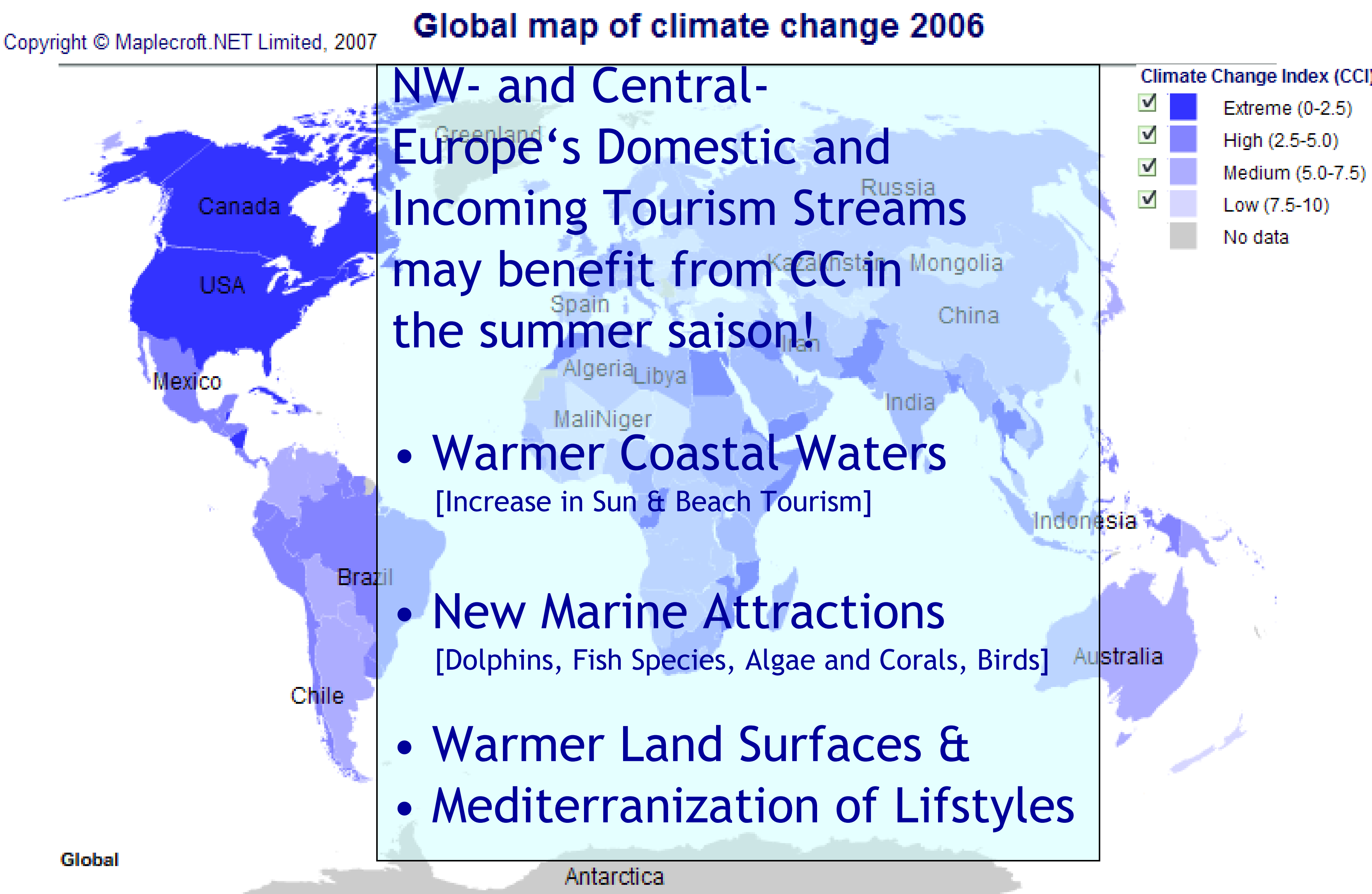
Source: Travel Research International 2002/2006

MAJOR TOURISM FLOW	ORIGIN MARKET CLIMATE CHANGE	DESTINATION REGION CLIMATE CHANGE	IMPLICATIONS FOR DESTINATION REGION	POSSIBLE MARKET REACTIONS
NORTH EAST AS... TO SOUTH EAST...			- No dramatic climatic changes ...tourist coast...	- Climatic factors unlikely to influence travel patterns greatly - Possible decline in dive and beach markets
NORTH EAS... TO NORTH AM...			...damage ... to south- ...index ...n and storm ...n east coast	- E. coast US and Canadian cities too hot in summer? - Sightseeing travel not likely to be greatly affected by climate change
NORTH AM... TO CARIBBE...			...lnerable to sea ...h erosion ...g and reef damage ...f aquifers ... costs for air ...or sea defences ...ntrol ...pical diseases (eg ...aria) - Increased pressure on natural resources and eco-systems	- Beach product offering becomes less attractive (heat index, beach erosion, sea and coral quality) - Less need to escape northern climate - Loss of confidence in destination health risks

Source: Travel Research International

Elderly (esp. European) may avoid travel to „very hot summer destinations“; i. g.

- the Mediterranean Basin
- East Coast USA
- South-West USA
- Australian Cities



NW- and Central-Europe‘s Domestic and Incoming Tourism Streams may benefit from CC in the summer saison!

- Warmer Coastal Waters
  [Increase in Sun & Beach Tourism]
- New Marine Attractions
  [Dolphins, Fish Species, Algae and Corals, Birds]
- Warmer Land Surfaces &
- Mediterranization of Lifstyles