Tourism Highlights

Edition 2003

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Overview 2002

Although 2002 was certainly not an easy year, international tourism held up fairly well. According to data collected by WTO from the vast majority of destination countries, the number of international tourist arrivals grew by 2.7 per cent in 2002 after a decrease of 0.5 per cent in 2001. For the first time, the 700 million mark was surpassed and compared to the previous record year 2000 almost 16 million more arrivals were counted.

Though many destinations started the year still in the negative, others managed to post increases. A gradual improvement was noticed over the months, although uncertainty continued to play a major role in the markets, under the threat of new terrorist attacks and the looming Iraq conflict. Additionally, the long-awaited economic recovery, was not taking place as rapidly as initially expected, affecting in particular some of the most important generating markets.

These adverse conditions resulted not so much in a decrease in overall volume but, above all, in the reinforcement of the shifts in demand towards trips to domestic and familiar destinations that were closer to home, and travel by car, coach or train instead of by plane. Consumers adopted a wait-and-see attitude, resulting in pressure on prices and late bookings. Many sectors went, and are still going, through a difficult time, in particular airlines and all sectors more dependent on long-haul traffic. Other products or market segments, however, have resisted well or even benefited, such as special interest trips or travel for the purpose of visiting family, friends and relatives (VFR). This climate has also accelerated a number of changes that were already underway in the industry. Low-cost airlines kept on growing in North America, and developed rapidly in Europe. The Internet strengthened its role not only as a means of information but also as a means of organizing and booking trips. Individual (not organized) travel proliferated, while tour operators faced relatively hard times. 'Do-it-yourself' is becoming more and more common, particularly for the mature and experienced travellers, vigorously stimulated by the possibilities offered by low-cost airlines and the Internet.

International Tourist Arrivals

	International Tourist Arrivals (million)					Change (%)		Share (%)
	1990	1995	2000	2001	2002*	01/00	02*/01	2002*
World	**455.9**	**550.4**	**687.3**	**684.1**	**702.6**	**-0.5**	**2.7**	**100**
Africa	**15.0**	**20.0**	**27.4**	**28.3**	**29.1**	**3.2**	**2.8**	**4.1**
North Africa	8.4	7.3	10.1	10.6	10.3	4.8	-2.4	1.5
West Africa	1.4	1.9	2.6	2.7	2.9	4.9	8.2	0.4
Central Africa	0.4	0.4	0.7	0.7	0.7	-0.9	12.0	0.1
East Africa	2.8	4.5	5.9	6.2	6.3	6.0	1.0	0.9
Southern Africa	2.0	6.0	8.2	8.2	8.9	-0.9	8.5	1.3
Americas	**93.0**	**108.8**	**128.0**	**120.2**	**114.9**	**-6.1**	**-4.4**	**16.3**
North America	71.7	80.5	91.2	84.4	81.6	-7.5	-3.3	11.6
Caribbean	11.4	14.0	17.2	16.9	16.1	-1.6	-5.0	2.3
Central America	1.9	2.6	4.3	4.4	4.7	1.7	6.4	0.7
South America	7.9	11.7	15.2	14.4	12.5	-5.0	-13.6	1.8
Asia and the Pacific	**57.7**	**85.6**	**115.3**	**121.1**	**131.3**	**5.1**	**8.4**	**18.7**
North-East Asia	28.0	44.1	62.5	65.6	73.6	5.0	12.2	10.5
South-East Asia	21.5	29.2	37.0	40.2	42.2	8.7	5.0	6.0
Oceania	5.2	8.1	9.6	9.5	9.6	-1.6	0.8	1.4
South Asia	3.2	4.2	6.1	5.8	5.9	-4.5	0.9	0.8
Europe	**280.6**	**322.3**	**392.7**	**390.8**	**399.8**	**-0.5**	**2.3**	**56.9**
Northern Europe	32.3	41.4	46.8	44.6	46.4	-4.7	4.1	6.6
Western Europe	113.8	116.7	142.8	139.2	141.1	-2.6	1.4	20.1
Central/Eastern Europe	39.0	61.4	62.3	63.4	65.2	1.8	2.9	9.3
Southern Europe	88.1	91.3	126.1	129.0	131.0	2.3	1.5	18.6
East Mediterranean Eu.	7.4	11.4	14.7	14.7	16.1	-0.1	9.4	2.3
Middle East	**9.7**	**13.6**	**24.0**	**23.6**	**27.6**	**-1.3**	**16.7**	**3.9**

Source: World Tourism Organization (WTO) © (Data as collected by WTO September 2003)

International Tourism Receipts – trading down and pressure on prices

Worldwide receipts for international tourism amounted to US$ 474 billion (euro 501 billion), corresponding to US$1.3 billion a day or some US$ 675 per tourist arrival. As a result of fluctuations in exchange rates it is always difficult to correctly interpret short-term trends as can be seen in the table. Expressed in (weighted) local currencies at constant prices (i.e. taking account of inflation) international tourism receipts increased by just 0.3 per cent over 2001, with decreases in both the Americas and in Europe offset by increases in Asia and the Pacific, the Middle East and Africa. Receipts grew slower than arrivals as a result of trading down in expenditure (shorter stays, closer to home, lower category of transport and accommodation, etc.) and a general pressure on prices.

International Tourism Receipts

	International Tourism Receipts (billion)				Change current prices (%)		Change constant prices (%)	
	1990	2000	2001	2002*	01/00	02*/01	01/00	02*/01
Local currencies					3.1	3.7	-1.0	0.3
US$	264.1	473.4	459.5	474.2	-2.9	3.2	-5.6	1.6
Euro	207.4	512.5	513.0	501.5	0.1	-2.2	-2.4	-4.4

Source: World Tourism Organization (WTO) © (Data as collected by WTO September 2003)

	International Tourism Receipts (US$ billion) 2002*	Change[1] (%) 2001/2000	Change[1] (%) 2002*/2001	Share (%)	Receipts per Arrival (US$)
World	**474**	**-1.0**	**0.3**	**100**	**675**
Africa	11.8	14.8	2.0	2.5	405
Americas	114.3	-9.9	-4.8	24.1	995
Asia and the Pacific	94.7	5.1	5.1	20.0	720
Europe	240.5	-1.1	-1.8	50.7	600
Middle East	13.0	-1.6	13.3	2.7	470

Source: World Tourism Organization (WTO) © (Data as collected by WTO September 2003)

[1] Local currencies, constant prices

Variable performance but little change

World's Top Tourism Destinations

Except for the change in positions between Canada and Mexico, the ranking of the world's top 10 destinations by arrivals remained unchanged in 2002. France and Spain firmly lead the ranking, together accounting for more than 18 per cent of all international arrivals, and the United States maintained its third position despite suffering declines for two years in a row. China confirmed its importance as a growing world tourism destination and achieved the fastest growth among the Top 10 (+11%).

The United States remains the unchallenged leader among the world earners with US$ 67 billion, in spite of the crisis and the significant drop of almost 20 per cent in receipts since 2000. Spain, France and Italy follow with receipts between US$ 34 and 27 billion each. Among the top earners, Hong Kong (China), China and Austria performed strongest, all recording double-digit growth in 2002.

International Tourist Arrivals (million)

Rank		Series	2002*	Change (%) 2002*/2001	Share (%)
	World		**703**	**2.7**	**100**
1	France	TF	77.0	2.4	11.0
2	Spain	TF	51.7	3.3	7.4
3	United States	TF	41.9	-6.7	6.0
4	Italy	TF	39.8	0.6	5.7
5	China	TF	36.8	11.0	5.2
6	United Kingdom	VF	24.2	5.9	3.4
7	Canada	TF	20.1	1.9	2.9
8	Mexico	TF	19.7	-0.7	2.8
9	Austria	TCE	18.6	2.4	2.6
10	Germany	TCE	18.0	0.6	2.6

International Tourism Receipts (US$ billion)

Rank		2002*	Change (%) 2002*/2001	Share (%)
	World	**474**	**3.2**	**100**
1	United States	66.5	-7.4	14.0
2	Spain	33.6	2.2	7.1
3	France	32.3	7.8	6.8
4	Italy	26.9	4.3	5.7
5	China	20.4	14.6	4.3
6	Germany	19.2	4.0	4.0
7	United Kingdom	17.8	9.5	3.8
8	Austria	11.2	11.1	2.4
9	Hong Kong (China)	10.1	22.2	2.1
10	Greece	9.7	3.1	2.1

Source: World Tourism Organization (WTO) © (Data as collected by WTO September 2003)

Regional Results

Europe - restrained by weak economy

Europe booked a moderate increase of slightly over 2 per cent and reached a total of 400 million international tourist arrivals. Receipts grew to US$ 240 billion, corresponding to US$ 600 per international tourist arrival. Results are fair, taking into account the overall weak economy of the region, in particular of Germany. Top destinations, France and Spain, recorded increases respectively just around and slightly above the regional average. Turkey led in terms of growth with an increase of 19%, while the Russian Federation, Ukraine and other CIS countries in general also performed rather well. The United Kingdom bucked the negative trend of the past three years.

Major destinations	Series[1]	International Tourist Arrivals				International Tourism Receipts			
		(1000)	Change (%)		Share (%)	(US$ million)	Change (%)		Share (%)
		2002*	01/00	02*/01	2002*	2002*	01/00	02*/01	2002*
Europe		**399,759**	**-0.5**	**2.3**	**100**	**240,490**	**-1.7**	**6.5**	**100**
Austria	TCE	18,611	1.1	2.4	4.7	11,237	1.9	11.1	4.7
Belgium	TCE	6,724	-0.1	4.2	1.7	6,892	4.7	-0.2	2.9
Croatia	TCE	6,944	12.2	6.1	1.7	3,811	20.9	14.3	1.6
France	TF	77,012	-2.6	2.4	19.3	32,329	-2.5	7.8	13.4
Germany	TCE	17,969	-5.9	0.6	4.5	19,158	-0.3	4.0	8.0
Greece	TF	14,180	7.3	0.9	3.5	9,741	2.4	3.1	4.1
Hungary	VF/2	15,870	-1.5	3.5	4.0	3,273	9.4	-13.2	1.4
Ireland	TF	6,476	-4.4	1.9	1.6	3,089	7.0	10.7	1.3
Italy	TF	39,799	-3.9	0.6	10.0	26,915	-6.2	4.3	11.2
Netherlands	TCE	9,595	-5.0	1.0	2.4	7,706	-6.8	14.6	3.2
Poland	TF	13,980	-13.8	-6.8	3.5	4,500	-21.1	-6.5	1.9
Portugal	TF	11,666	0.6	-4.1	2.9	5,919	4.2	7.5	2.5
Russian Fed	TF	7,943	5.3	7.3	2.0	4,188	3.8	17.6	1.7
Spain	TF	51,748	4.6	3.3	12.9	33,609	4.5	2.2	14.0
Switzerland	TF	10,000	-1.8	-7.4	2.5	7,628	-3.5	4.4	3.2
Turkey	TF	12,782	12.5	18.5	3.2	9,010	-3.3	22.0	3.7
Ukraine	TF	6,326	31.4	9.2	1.6	2,992	23.5	9.8	1.2
United Kingdom	VF	24,180	-9.4	5.9	6.0	17,591	-16.7	8.0	7.3

Source: World Tourism Organization (WTO) ©

(Data as collected by WTO September 2003)

Asia and the Pacific - going strong as ever

Asia and the Pacific continued its vigorous performance of the past years with an increase of 10 million international tourist arrivals to 131 million (+8%). International tourism receipts amounted to US$ 95 billion or US$ 720 per arrival. The region is profiting from strong intraregional demand and has not been very much affected by the weak economy of Japan, traditionally its major generating market. New emerging markets such as China, Hong Kong (China), the Republic of Korea, Taiwan (P.R. of China) and Singapore are increasingly taking over the role of the motor of tourism in the region. Northeast Asia led all subregions with 12 per cent growth in international tourist arrivals, with China (+11%), Hong Kong (China) (+21%), Macao (China) (+12%) and Japan (+10%) all recording double-digit increases. The solid growth of Northeast Asia in recent years is very much the reflection of the growing role of China as both tourism destination and generating market to neighbouring countries. Southeast Asia and Oceania grew at more moderate rates of 5 per cent and 1 per cent respectively. South Asia, which declined by 4.5 per cent in 2001, recorded a 1 per cent increase last year.

Major destinations	Series[1]	International Tourist Arrivals				International Tourism Receipts			
		(1000)	Change (%)		Share (%)	(US$ million)	Change (%)		Share (%)
		2002*	01/00	02*/01	2002*	2002*	01/00	02*/01	2002*
Asia and the Pacific		**131,295**	**5.1**	**8.4**	**100**	**94,697**	**1.2**	**7.7**	**100**
Australia	VF	4,841	-1.5	-0.3	3.7	8,087	-9.8	6.1	8.5
China	TF	36,803	6.2	11.0	28.0	20,385	9.7	14.6	21.5
Hong Kong (China)	VF	16,566	5.1	20.7	12.6	10,117	5.0	22.2	10.7
India	TF	2,370	-4.2	-6.6	1.8	2,923	-4.0	-3.9	3.1
Indonesia	TF	5,033	1.8	-2.3	3.8	–	-5.9	–	–
Japan	TF	5,239	0.3	9.8	4.0	3,499	-2.1	6.0	3.7
Korea, Republic of	VF	5,347	-3.3	3.9	4.1	5,277	-6.4	-17.2	5.6
Macao (China)	TF	6,565	12.4	12.4	5.0	4,415	16.8	17.9	4.7
Malaysia	TF	13,292	25.0	4.0	10.1	6,785	39.7	6.4	7.2
New Zealand	VF	2,045	6.9	7.1	1.6	2,918	4.2	25.0	3.1
Philippines	TF	1,933	-9.8	7.6	1.5	1,741	-19.3	1.0	1.8
Singapore	TF	6,996	-2.8	4.0	5.3	4,932	-15.6	-2.9	5.2
Taiwan (Pr. of China)	VF	2,726	-0.3	4.2	2.1	4,197	6.7	5.2	4.4
Thailand	TF	10,873	5.8	7.3	8.3	7,902	-5.5	11.7	8.3

Source: World Tourism Organization (WTO) ©

(Data as collected by WTO September 2003)

[1] series-**TF**: International tourist arrivals at frontiers (excluding same-day visitors); **VF**: International visitor arrivals at frontiers (including tourists and same-day visitors); **THS**: International tourist arrivals at hotels and similar establishments; **TCE**: International tourist arrivals at collective tourism establishments.

Americas - still feeling the impact of "11 September"

Destinations in the Americas in general continued to suffer declines in international arrivals in 2002 resulting in a decrease of the regional total by 4%. Declines were particularly significant in South America (-14%) and the Caribbean (-5%), induced mostly by the reduced outbound traffic from the United States and Argentina. Two of the main regional destinations, the United States and Mexico, show negative results, though Mexico performed well in terms of tourism receipts (+5%). Given its positive performance (+2%), Canada overtook Mexico as the second most important destination in the region. South America was plagued by the economic problems in the subregion, in particular in Argentina and Venezuela. Argentina's neighbours recorded considerable losses, most notably Uruguay (-34%) and Brazil (-21%). Argentina itself posted growth of 8%, due to the beneficial effect of the devaluation of the peso for international travellers. The Americas leads all regions in receipts per arrival at almost US$ 1000, corresponding to a total of over US$ 114 billion.

Major destinations	Series[1]	International Tourist Arrivals (1000) 2002*	Change (%) 01/00	Change (%) 02*/01	Share (%) 2002*	International Tourism Receipts (US$ million) 2002*	Change (%) 01/00	Change (%) 02*/01	Share (%) 2002*
Americas		**114,855**	**-6.1**	**-4.4**	**100**	**114,255**	**-8.4**	**-6.5**	**100**
Argentina	TF	2,820	-9.9	7.6	2.5	–	-10	–	–
Brazil	TF	3,783	-10.2	-20.7	3.3	3,120	-12	-16	2.7
Canada	TF	20,057	0.3	1.9	17.5	9,700	-0.6	-10.0	8.5
Chile	TF	1,412	-1.1	-18.0	1.2	733	-2.6	-8.2	0.6
Costa Rica	TF	1,113	4.0	-1.6	1.0	1,078	-10.9	-1.6	0.9
Cuba	TF	1,656	-0.3	-4.6	1.4	1,633	-2.6	-3.5	1.4
Dominican Rp	TF	2,811	-3.0	-2.5	2.4	2,736	-2.2	-2.2	2.4
Jamaica	TF	1,266	-3.5	-0.8	1.1	1,209	-7.5	-1.9	1.1
Mexico	TF	19,667	-4.0	-0.7	17.1	8,858	1.3	5.4	7.8
Puerto Rico	TF	3,087	6.3	-13.1	2.7	2,486	14.2	-8.9	2.2
United States	TF	41,892	-11.9	-6.7	36.5	66,547	-12.8	-7.4	58.2
Uruguay	TF	1,258	-3.9	-33.5	1.1	318	-14.0	-43.3	0.3

 (Data as collected by WTO September 2003)

Africa - weak North but successful sub-Saharan destinations

In 2002, Africa recorded a 2.8 per cent increase in international tourist arrivals to 29 million. By subregion and country results were rather mixed. North Africa experienced an overall decline of 2% because of decreases in its major destinations Tunisia (-6%) and Morocco (-1%). By contrast, many destinations of sub-Saharan Africa recorded sound results, most notably the region's top destination South Africa (+11%). International tourism receipts reached almost US$ 12 billion, corresponding to US$ 405 per tourist arrival.

Major destinations	Series[1]	International Tourist Arrivals (1000) 2002*	Change (%) 01/00	Change (%) 02*/01	Share (%) 2002*	International Tourism Receipts (US$ million) 2002*	Change (%) 01/00	Change (%) 02*/01	Share (%) 2002*
Africa		**29,136**	**3.2**	**2.8**	**100**	**11,785**	**7.8**	**1.0**	**100**
Algeria	VF	998	4.1	10.7	3.4	133	4.2	33.0	1.1
Botswana	TF	1,037	-5.0	-1.1	3.6	309	-4.2	3.0	2.6
Ghana	TF	483	10.0	10.1	1.7	520	16.1	16.1	4.4
Kenya	TF	838	-6.5	-0.4	2.9	297	11.6	-3.6	2.5
Mauritius	TF	682	0.6	3.2	2.3	612	15.1	-1.9	5.2
Morocco	TF	4,193	2.7	-0.7	14.4	2,152	23.8	-14.8	18.3
South Africa	VF	6,550	-1.5	10.9	22.5	2,719	-0.5	8.7	23.1
Tanzania	TF	550	9.2	9.8	1.9	730	-1.9	0.7	6.2
Tunisia	TF	5,064	6.5	-6.0	17.4	1,422	7.3	-11.4	12.1
Zambia	TF	565	7.6	14.8	1.9	–	5.4	–	–

 (Data as collected by WTO September 2003)

Middle East - bouncing back strongly

In spite of the continuing difficult conditions, the Middle East rebounded surprisingly strongly in 2002. After the loss of 1 per cent suffered in 2001, the region grew by 17 per cent to a total of almost 28 million international tourist arrivals. All major destinations consistently show double-digit increases, ranging from 10 for Jordan to 32 per cent for United Arab Emirates. This evolution can on one hand be seen as the result of the substantial investment in tourism infrastructure in the region, and on the other hand as the reflection of the strong potential of the intraregional market, with Saudi Arabia becoming an important player, not only as a destination but also as a source market. International tourism receipts for the region grew to US$ 13 billion, corresponding to US$ 470 per international tourist arrival.

Major destinations	Series[1]	International Tourist Arrivals (1000) 2002*	Change (%) 01/00	Change (%) 02*/01	Share (%) 2002*	International Tourism Receipts (US$ million) 2002*	Change (%) 01/00	Change (%) 02*/01	Share (%) 2002*
Middle East		**27,594**	**-1.3**	**16.7**	**100**	**12,963**	**-5.2**	**10.0**	**100**
Bahrain	TF	3,167	15.2	13.6	11.5	–	9.9	–	–
Egypt	TF	4,906	-14.8	12.6	17.8	3,764	-12.5	-0.9	29.0
Jordan	TF	1,622	3.6	9.8	5.9	786	-3.0	12.3	6.1
Lebanon	TF	956	12.9	14.2	3.5	956	12.8	14.2	7.4
Saudi Arabia	TF	7,511	2.1	11.7	27.2	–	–	–	–
Syrian Arab Republic	TCE	2,809[a]	-6.9	–[a]	10.2	1,366	–	–	10.5
Untd Arab Emirates	THS	5,445	5.8	31.7	19.7	1,328	5.1	24.8	10.2

 (Data as collected by WTO September 2003) [a] change of series.

Outbound Tourism

Outbound tourism by generating regions – long-haul still stagnant

In terms of source markets, international tourism is still relatively concentrated in the industrialized countries of Europe, the Americas and East Asia and the Pacific. However, with rising levels of disposable income, many emerging economies have shown fast growth in the last decades, in particular in Northeast and Southeast Asia, Central and Eastern Europe, the Middle East and Southern Africa. Except for the Americas, which decreased for the second year in a row, all regions showed growth in 2002, with the highest increases recorded in the Middle East (+10%) and Asia and the Pacific (+8%). By far most international travel takes place within the same region, some four fifths of the total. While in normal circumstances travel between regions tends to grow at a faster rate than intraregional travel, in the last two years, the trend was the opposite. In 2002, travel to other regions was flat after a decrease of 6% in 2001, while intraregional travel still grew in both years by 1% and 3% respectively.

	International Tourist Arrivals (millions)					Change (%)		Share (%)
	1990	1995	2000	2001	2002*	2001/00	2002*/01	2002*
World	**455.9**	**550.4**	**687.3**	**684.1**	**702.6**	**-0.5**	**2.7**	**100**
From:								
Africa	9.9	12.8	16.1	16.3	16.8	1.4	3.3	2.4
Americas	99.2	107.9	130.5	123.7	120.2	-5.2	-2.8	17.1
Asia and the Pacific	60.2	89.8	118.9	121.6	131.2	2.3	7.9	18.7
Europe	263.9	317.6	394.8	394.3	404.9	-0.1	2.7	57.6
Middle East	8.0	9.5	14.2	14.6	16.0	2.9	9.5	2.3
Origin not specified*	14.7	12.9	12.9	13.7	13.5			1.9
Same region	361.4	437.9	538.8	543.2	561.9	0.8	3.4	80.0
Other regions	79.8	99.6	135.6	127.2	127.2	-6.2	0.0	18.1

Source: World Tourism Organization (WTO) © (Data as collected by WTO September 2003)

* Countries that could not be allocated to a specific region of origin. As information is derived from inbound tourism data this occurs when data on the country of origin is missing or when a category such as 'other countries of the world' is used grouping countries together that are not seperately specified.

World's Top Tourism Spenders

Distance to regional leaders is reducing

The ranking of the world's top spenders on international tourism remained virtually unchanged, except for the entry of the Russian Federation in tenth position to the detriment of Canada. Expenditure by the regional leaders United States, Germany (in euro terms actually performing negatively) and Japan stagnated or only grew marginally in 2002, while the Russian Federation (+21%), Italy (+14%), China (+11%) and the United Kingdom (+11%) still added a double-digit increase.

Rank		International Tourism Expenditure (US$ billion) 2002*	Change (%) 2002*/2001	Share (%) 2002*
	World	**474**	**3.2**	**100**
1	United States	58.0	-3.6	12.2
2	Germany	53.2	2.4	11.2
3	United Kingdom	40.4	10.8	8.5
4	Japan	26.7	0.6	5.6
5	France	19.5	9.8	4.1
6	Italy	16.9	14.4	3.6
7	China	15.4	10.7	3.2
8	Netherlands	12.9	7.5	2.7
9	Hong Kong (China)	12.4	0.8	2.6
10	Russian Federation	12.0	20.5	2.5

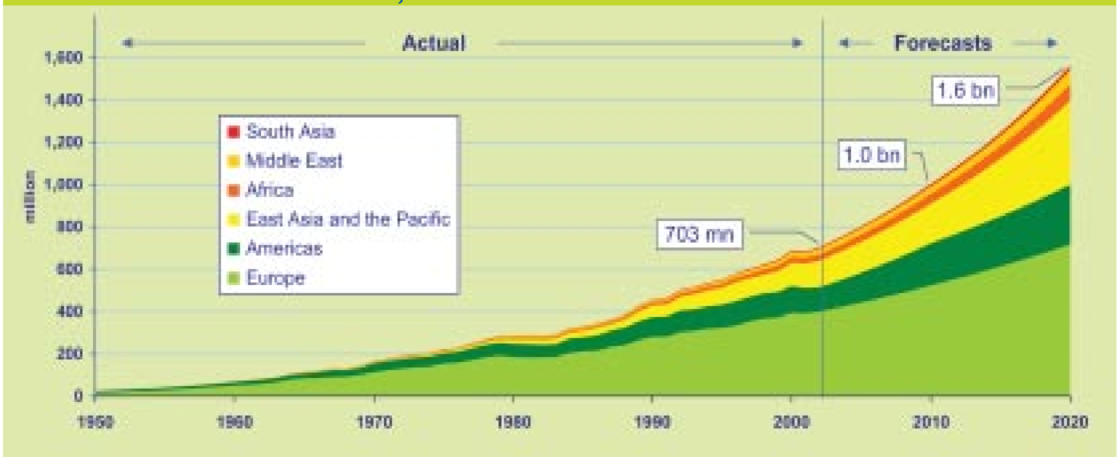
Source: World Tourism Organization (WTO) © (Data as collected by WTO September 2003)

Long-term Prospects

Tourism 2020 Vision is the World Tourism Organization's long-term forecast and assessment of the development of tourism up to the first 20 years of the new millennium. An essential outcome of the *Tourism 2020 Vision* are quantitative forecasts covering a 25 years period, with 1995 as base year and forecasts for 2000, 2010 and 2020.

Although the evolution of tourism in the last few years has been irregular, WTO maintains its long-term forecast for the moment. The underlying structural trends of the forecast are believed not to have significantly changed. Experience shows that in the short-term, periods of faster growth (1995, 1996, 2000) alternate with periods of slow growth (2001 and 2002). While the pace of growth till 2000 actually exceeded the *Tourism 2020 Vision* forecast, it is generally expected that the current slowdown will be compensated in the mid- to long-term.

International Tourist Arrivals, 1950-2020



Source: World Tourism Organization (WTO)

WTO's *Tourism 2020 Vision* forecasts that international arrivals are expected to reach over 1.56 billion by the year 2020. Of these worldwide arrivals in 2020, 1.18 billion will be intraregional and 377 million will be long-haul travellers.

The total tourist arrivals by region shows that by 2020 the top three receiving regions will be Europe (717 million tourists), East Asia and the Pacific (397 million) and Americas (282 million), followed by Africa, the Middle East and South Asia.

East Asia and the Pacific, South Asia, the Middle East and Africa are forecasted to record growth at rates of over 5 per cent per year, compared to the world average of 4.1 per cent. The more mature regions Europe and Americas are anticipated to show lower than average growth rates. Europe will maintain the highest share of world arrivals, although there will be a decline from 60 per cent in 1995 to 46 per cent in 2020.

International Tourist Arrivals by Region (millions)

	Base Year	Forecasts		Average Annual Growth Rate (%)	Share (%)	
	1995	2010	2020	1995-2020	1995	2020
Total	**565.4**	**1,006.4**	**1,561.1**	**4.1**	**100**	**100**
Africa	20.2	47.0	77.3	5.5	3.6	5.0
Americas	108.9	190.4	282.3	3.9	19.3	18.1
East Asia/Pacific	81.4	195.2	397.2	6.5	14.4	25.4
Europe	338.4	527.3	717.0	3.0	59.8	45.9
Middle East	12.4	35.9	68.5	7.1	2.2	4.4
South Asia	4.2	10.6	18.8	6.2	0.7	1.2
Intraregional (a)	464.1	790.9	1,183.3	3.8	82.1	75.8
Long-Haul (b)	101.3	215.5	377.9	5.4	17.9	24.2

Source: World Tourism Organization (WTO)

Notes:

a) Intraregional includes arrivals where country of origin is not specified

b) Long-Haul is defined as everything except intraregional travel.

Long-haul travel worldwide will grow faster, at 5.4 per cent per year over the period 1995-2020, than intraregional travel, at 3.8 per cent. Consequently the ratio between intraregional and long haul travel will shift from around 82:18 in 1995 to close to 76:24 in 2020.

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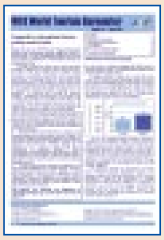
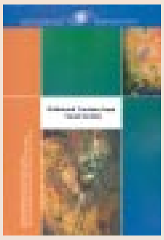


WTO World Tourism Barometer

WTO World Tourism Barometer is a new WTO service with the aim of monitoring the short-term evolution of tourism and providing the tourism sector with adequate and timely information.
The WTO World Tourism Barometer is published three times a year (January, June and October). At the outset it contains three permanent elements: an overview of short-term tourism data from destination countries and air transport; a retrospective and prospective evaluation of tourism performance by the WTO Panel of Tourism Experts and selected economic data relevant for tourism.

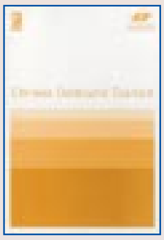
Price: € 60 for 3 issues (electronic version), € 90 (electronic and print version)
Available in English, French and Spanish in print and electronic version (pdf).



Outbound Tourism from Saudi Arabia

For tourism product development and the promotion of destinations in today's competitive age, it is necessary to achieve a clear profile of the travel behaviour and preferences of actual and potential clients. This report provides a sound basis of information on outbound tourism from Saudi Arabia. It focuses on the characteristics of outbound travel, gives significant information on the generating market and describes the target group profiles. The series of outbound tourism reports has become an essential and valuable tool for both the public and private sector in destinations interested in or receiving tourists from these markets as well as for the travel industry in these generating countries.

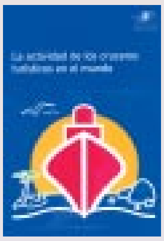
Published: August 2003 Price: € 30 *Available in English*



Chinese Outbound Tourism

According to the forecasts from the World Tourism Organization, China will have 100 million outbound travellers and become the fourth largest source of outbound travel in the world by 2020.
This publication provides a profile of Chinese travellers and information on the generating places of outbound tourists, as well as on the various destinations for Chinese travellers. It further discusses the development of China's outbound tourism, its outbound tourism policy, and the various marketing and promotions on the Chinese market.

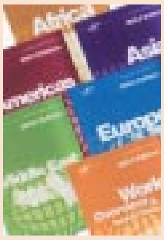
Published: April 2003 Price: € 30 *Available in English*



Worldwide Cruise Ship Activity

During the last decade, the cruise industry has been the tourism subsector with the highest growth rate. WTO prepared this report with the aim of analysing the influences of this sector more profoundly. It examines the activities of sea cruises and pays special attention to the US and Canadian markets as they reflect two thirds of the world market share. Divided into eight chapters, the study analyses topics such as the current demand for cruises, the specialties of the cruise product, the financial aspects, sustainability of the marine environment. It also offers a chapter on medium-term macrotrends and discusses the opportunities arising.

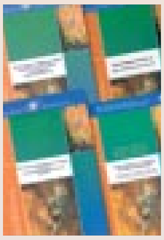
Published: February 2003
Price: € 80
Available in English, French and Spanish



Tourism Market Trends, 2003 Edition

A set of reports with a comprehensive and timely analysis of international tourism trends in the world and the various regions, subregions and countries. The 2003 Edition of the series examines short- and medium-term tourism development through 2002 and analyses statistical information on international tourist arrivals, international tourism receipts, region of origin of arrivals, purpose of visit, means of transport, trips abroad, international tourism expenditure, etc. The five regional volumes highlight the regional and subregional trends and present for each country a digest of statistical data as well as a qualitative evaluation of the past year with respect to tourism products, access, markets, marketing and promotion, tourism policy, etc. The volume *World Overview & Tourism Topics* offers an analysis of the evolution of international tourism on an aggregated level together with a discussion of tourism topics of interest.

Published: October 2003
Price: € 75 each. Set of five regional reports + World Overview: € 290
Africa: Available in English and French
Americas: Available in English and Spanish
Asia: Available in English
Europe: Available in English and French
Middle East: Available in English
World Overview & Tourism Topics: Available in English, French and Spanish



Tourism Recovery Package

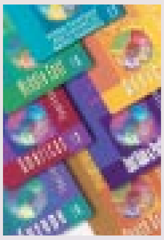
This set of reports contains information generated by the WTO in the framework of the Tourism Recovery Committee analysing world tourism after September 11th and various presentations. All reports are available individually or as a complete set.

Price: € 30 each Set of the 5 reports: € 100

The five reports are:

1. **Tourism after 11 September 2001: Analysis, remedial actions and prospects** (2001)
2. **Tourism Recovery Committee for the Mediterranean Region** (2002)
3. **The impact of the September 11th attacks on tourism: The light at the end of the tunnel** (2002)
4. **2002: Climbing towards recovery?** (2002)
5. **Fourth meeting Tourism Recovery Committee ITB Berlin 2003** (2003)

All reports available in English, French and Spanish



Tourism 2020 Vision

The reports continue WTO's programme in the field of forecast studies. The series is comprised of a world volume on global forecasts and profiles of market segments and six regional volumes (Africa, Americas, East Asia and the Pacific, Europe, Middle East and South Asia). Each regional volume is divided into three parts. Part one examines the developments of tourism in the region in the first half of the 1990s, analysing especially the key factors which determined the region's prospects. The second part deals with the various determinants governing the forecast to the year 2020, while the third part presents the forecasts themselves taking as well into account the different sub-regions.

Published: 2000, 2001 Price: € 75 each
Set of six regional reports + Global Forecasts: € 425

Volume 1, Africa: Available in English and French
Volume 2, Americas: Available in English and Spanish
Volume 3, East Asia & Pacific: Available in English
Volume 4, Europe: Available in English and French
Volume 5, Middle East: Available in English
Volume 6, South Asia: Available in English
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OMT · WTO · BTO
Capitán Haya, 42
28020 Madrid
Spain
Tel.: (34) 91 567 81 00
Fax: (34) 91 571 37 33

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