

Tourism Highlights

2005 Edition



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Overview

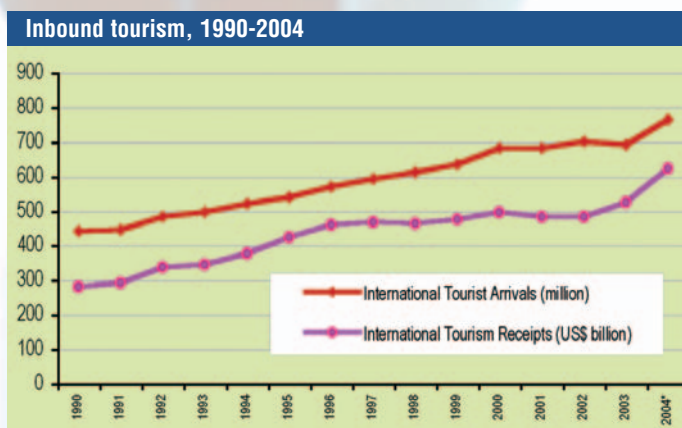
International Tourism 2004

After three years of stagnant growth, international tourism experienced a spectacular rebound in 2004 with the great majority of destinations reporting positive results and many breaking records. World tourism was above all marked by the strong rebound of Asia and the Pacific after the SARS-induced setbacks suffered in 2003, and by the return of the Americas to positive results. The recovery of the world economy, and in particular of the economies of major American and European generating markets, together with the strength of the Asian economies, strongly contributed to the extraordinary results of tourism in 2004. Fears of the impact of the oil prices faded as time went by, as the price increases were being absorbed by the economy, and were not affecting consumer confidence.

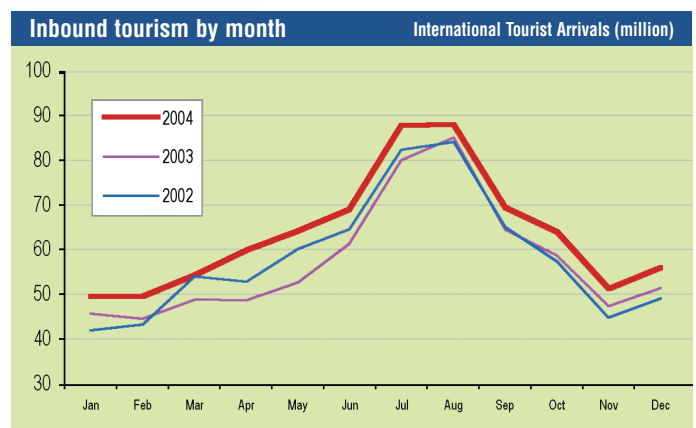
International tourist arrivals reached an all-time record of 763 million in 2004. In relative terms growth over 2003 corresponds to almost 11%, the highest and the only double-digit percentage recorded since 1980, when the current detailed collection of data started. Growth was common to all regions, but was particularly strong in Asia and the Pacific (+28%) and in the Middle East (+18%). Double-digit growth was also registered in the Americas (+11%). Africa (+8%) and Europe (+5%) performed below the world average, but on positive results in the previous year, and still substantially bettered their results. Also by subregion all results are positive.

In absolute terms the number of international tourist arrivals worldwide increased in 2004 by 73 million, representing a volume equivalent to a new 'destination' of virtually the size of France, the world's top destination in terms of international tourist arrivals. All regions shared in the increase, although to varying degrees. Asia and the Pacific gained almost half of all new arrivals, over 33 million. Europe, even though growing at a slower pace but on a much larger base, comes second with an increase of 20 million arrivals.

Although the leap of 2004 certainly should be viewed primarily as a reaction to depressed figures in 2003 due to the Iraq war, SARS and the weak economy, compared to the previous record year 2002, the increase still amounts to 63 million (+9%). Asia and the Pacific more than compensated for its 9% loss of 2003, and compared to 2002 current results are still 16% higher. The only two subregions that did not break their previous records are North America and Western Europe, respectively falling 6 million and 1 million short of the volume recorded in 2000.



Source: World Tourism Organization (WTO) ©



Source: World Tourism Organization (WTO) ©

* = provisional figure or data; - = figure or data not (yet) available

Series International Tourist Arrivals: TF: International tourist arrivals at frontiers (excluding same-day visitors); VF: International visitor arrivals at frontiers (tourists and same-day visitors); THS: International tourist arrivals at hotels and similar establishments; TCE: International tourist arrivals at collective tourism establishments.

International Tourist Arrivals

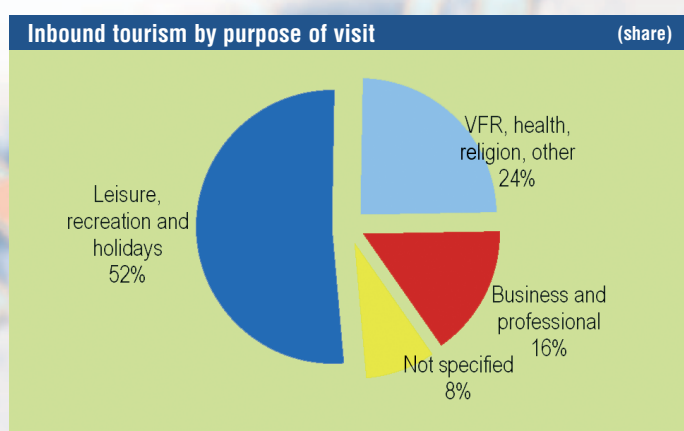
	International Tourist Arrivals (million)							Market share (%) 2004*	Change (%)	
	1990	1995	2000	2001	2002	2003	2004*		03/02	04*/03
World	441	538	681	680	700	690	763	100	-1.5	10.7
Europe	264.8	309.3	384.1	383.8	394.0	396.6	416.4	54.5	0.6	5.0
Northern Europe	30.3	39.4	44.6	42.3	43.8	44.5	48.4	6.3	1.8	8.6
Western Europe	108.6	112.2	139.7	135.8	138.0	136.1	138.7	18.2	-1.4	1.9
Central/Eastern Europe	32.0	55.0	59.1	61.9	64.7	68.3	78.4	10.3	5.5	14.8
Southern/Mediterranean Europe	93.9	102.7	140.8	143.7	147.6	147.7	150.9	19.8	0.1	2.2
Asia and the Pacific	57.7	85.0	114.9	120.7	131.1	119.3	152.5	20.0	-9.0	27.9
North-East Asia	28.0	44.1	62.5	65.9	74.1	67.6	87.6	11.5	-8.8	29.6
South-East Asia	21.5	28.6	37.0	40.0	42.0	36.2	47.3	6.2	-13.9	30.7
Oceania	5.2	8.1	9.2	9.1	9.1	9.0	10.2	1.3	-1.0	12.5
South Asia	3.2	4.2	6.1	5.8	5.8	6.4	7.5	1.0	10.2	16.7
Americas	92.8	109.0	128.2	122.1	116.6	113.1	125.8	16.5	-3.0	11.2
North America	71.7	80.7	91.5	86.4	83.3	77.4	85.8	11.2	-7.1	10.9
Caribbean	11.4	14.0	17.1	16.8	16.0	17.0	18.2	2.4	6.5	6.7
Central America	1.9	2.6	4.3	4.4	4.7	4.9	5.8	0.8	4.2	17.8
South America	7.7	11.7	15.2	14.5	12.6	13.7	16.0	2.1	8.8	16.2
Africa	15.2	20.4	28.2	28.9	29.5	30.8	33.2	4.4	4.3	8.0
North Africa	8.4	7.3	10.2	10.7	10.4	11.1	12.8	1.7	6.6	15.3
Subsaharan Africa	6.8	13.2	18.0	18.2	19.1	19.7	20.4	2.7	3.1	3.9
Middle East	10.0	14.3	25.2	25.0	29.2	30.0	35.4	4.6	2.9	18.0

Source: World Tourism Organization (WTO) ©

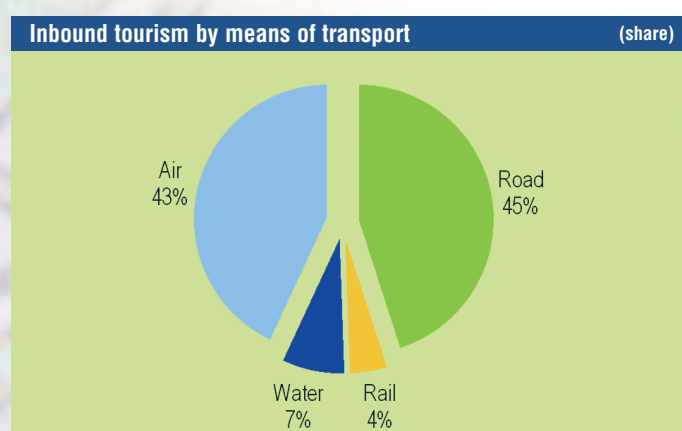
(Data as collected by WTO 2005)

In 2004, the majority of international tourist arrivals corresponded to trips for the purpose of leisure, recreation and holidays (52%) reaching a total of 395 million. Business travel accounted for some 16 per cent of the total (120 million) and another 24% covered travel for other motives, such as visiting friends and relatives (VFR), religious purposes/pilgrimages, health treatment, etc (185 million). For the remaining 8% of arrivals the purpose of visit has not been specified.

Just about half of all international tourists arrived over land by road (45%) or rail (4%) to their destination in 2004. Air transport represented 43% of arrivals and transport over water accounted for 7%. After three sluggish years air transport rose by 15% in 2004, while transport over water increased by 9% and transport over land by 7%.



Source: World Tourism Organization (WTO) ©



Source: World Tourism Organization (WTO) ©

Growth in receipts mirrors arrivals growth

International tourism receipts grew in 2004 at a rate slightly lower than that of international tourist arrivals. Expressed in local currencies at constant prices –thus neutralising the effect of exchange rate changes and inflation– international tourism receipts grew by 9%, after declining for the three previous years.

In absolute figures worldwide earnings on international tourism reached in 2004 a new record value of US\$ 623 billion. In US dollar terms receipts increased by almost 100 billion, however, this is flattered by the rather generalized depreciation of the US dollar in 2004, causing receipts earned in currencies such as the euro, Canadian dollar, Japanese yen or Australian dollar to be translated into larger amounts of US dollars. Expressed in euros, receipts increased by 38 billion to 501 billion. Europe earned a bit over half of worldwide receipts (52%), the Americas 21%, Asia and the Pacific 20% and Africa and the Middle East around 3% each.

	International Tourism Receipts (billion)							Change current prices (%)		Change constant prices (%)	
	1990	1995	2000	2001	2002	2003	2004*	03/02	04*/03	03/02	04*/03
	Local currencies								0.2	12.7	-3.1
US\$	280	423	496	482	482	524	623	8.9	18.8	6.4	15.7
Euro	220	323	537	538	509	463	501	-9.0	8.0	-10.4	6.1

Source: World Tourism Organization (WTO) ©

(Data as collected by WTO 2005)

All regions posted positive results, ranging between 25% for Asia and the Pacific and 3% for Europe (values in local currencies at constant prices, as in US dollars receipts increased much more of course as a result of the considerable appreciation of the euro). Both the Americas and Europe report positive results after three negative years. International tourism receipts grew by 11% in the Americas due in particular to the recovery of North American destinations (+13%). Results were positive in North America for the first time since 2001 as all destinations recovered from the setbacks of the previous years, in particular the US, where receipts grew by a remarkable 16% to a total volume of nearly US\$ 75 billion or 12% of the world's tourism receipts. Europe recorded a 3% increase as all subregions rebounded from their 2003 negative results, although still comparatively feeble in the case of Western Europe (+1.7%) and Southern and Mediterranean Europe (+2.3%). International tourism receipts grew by an exceptional 25% in Asia and the Pacific, following the 10% loss of the 2003 SARS year. The fastest growing subregion was North-East Asia (+30%). Growth was also particularly buoyant in the Middle East (+22%). Africa posted more modest growth (+5%), constrained by the results of Subsaharan Africa (+3%) after having been the star performer of the past three years.

International Tourism Receipts	Change		Share (%)	US\$			Euro		
	Local currencies, constant prices (%)			(billion)		Receipts per Arrival	(billion)		Receipts per Arrival
	03/02	04*/03	2004*	2003	2004*	2004*	2003	2004*	2004*
World	-3.1	9.1	100	524	623	820	463	501	660
Europe	-2.6	2.6	52.5	282.9	326.7	780	250.1	262.6	630
Northern Europe	-1.6	4.0	7.9	41.9	48.9	1.010	37.1	39.3	810
Western Europe	-3.0	1.7	18.8	103.1	117.4	850	91.2	94.4	680
Central/Eastern Europe	-3.3	5.1	4.4	22.9	27.5	350	20.2	22.1	280
Southern/Mediterranean Eu.	-2.5	2.3	21.3	114.9	132.9	880	101.6	106.9	710
Asia and the Pacific	-9.9	24.7	20.1	94.9	125.0	820	83.9	100.5	660
North-East Asia	-11.3	29.9	10.2	47.1	63.6	730	41.6	51.1	580
South-East Asia	-16.2	25.8	5.1	24.3	31.8	670	21.5	25.5	540
Oceania	1.6	11.6	3.6	17.6	22.3	2.190	15.6	17.9	1.760
South Asia	5.5	18.1	1.2	5.8	7.3	980	5.1	5.9	790
Americas	-1.5	11.1	21.1	114.1	131.7	1.050	100.9	105.9	840
North America	-4.7	12.7	15.8	84.3	98.1	1.140	74.5	78.8	920
Caribbean	11.0	3.1	3.1	17.8	19.2	1.050	15.8	15.4	850
Central America	9.0	12.5	0.6	3.3	3.9	670	3.0	3.1	540
South America	3.9	11.8	1.7	8.7	10.6	660	7.7	8.5	530
Africa	6.4	5.3	2.9	15.5	18.3	550	13.7	14.7	440
North Africa	-0.2	11.2	1.0	5.0	6.1	480	4.5	4.9	380
Subsaharan Africa	10.3	2.5	2.0	10.5	12.2	600	9.2	9.8	480
Middle East	13.8	21.9	3.4	16.8	21.0	590	14.9	16.9	480

Source: World Tourism Organization (WTO) ©

(Data as collected by WTO 2005)

For destination countries receipts from international tourism count as exports and cover all transactions related to the consumption by international visitors of, for instance, lodging, food and drinks, fuel, transport in the country, entertainment, shopping, etc. This figure includes transactions generated by overnight as well as by same-day visitors, which can be substantial, especially in the case of neighbouring countries where a lot of shopping for goods and services is done by cross-border visitors. However, it does not include receipts from international passenger transport contracted from companies outside the travellers' country of residence, which are reported in the separate category of international fare receipts. For the most recent years, worldwide international fare receipts are estimated at about 17% of total tourism and fare receipts, corresponding to some 127 billion US dollars in 2004, thus bringing the total export value of international tourism including transport fares to 750 billion US dollars.

Asian destinations on the rise

In 2004, the top 10 tourism destinations in terms of arrivals accounted jointly for 363 million international tourist arrivals or nearly half of the 763 million arrivals reported worldwide. In the ranking by receipts the picture is similar with the top 10 world tourism earners representing more than half of the overall tourism receipts (US\$ 321 billion). As receipts per arrival can vary considerably from the worldwide average of US\$ 820, for the ranking of top tourism destinations it is advisable to take both receipts and arrivals into account.

International Tourist Arrivals

In the ranking by volume of arrivals the main change refers to the reinforcement of Asian destinations as a result of the strong rebound experienced last year. France maintains the leading position as the world's most visited destination with 75 million tourist arrivals in 2004, or almost the same level of 2003 (+0.1%). Spain, where tourist arrivals grew by 3%, ranks second with close to 54 million arrivals. It is followed by the US, with 46 million arrivals, and a significant recovery over the poor results of the past three years (+12% as compared to 2003). The most significant change in the ranking by international tourist arrivals was experienced by China, moving from the 5th to the 4th position. In 2004, China fully recovered from the setbacks of SARS and posted a spectacular 27% increase, achieving an all-time record of almost 42 million tourist arrivals, while tourist arrivals to Italy declined by more than 6% to a total of 37 million. The United Kingdom maintained the 6th position with almost 28 million arrivals in 2004 (+12%). Hong Kong (China), Mexico, Germany and Austria follow in the remaining positions with volumes of around 20 million each.

International Tourism Receipts

By earnings, no major changes are to be mentioned in the first seven positions compared to 2003. The US (US\$ 74 billion) continues to lead the table of the world's top tourism earners and saw a strong comeback in 2004 on the losses of the three previous years as tourism earnings grew by nearly 16%. Spain (US\$ 45 billion) and France (US\$ 41 billion) occupy the following two positions at a considerable distance. The first three destinations in arrivals are thus also the first in receipts, although in reverse order. Italy maintains firm the fourth position in receipts, (US\$ 36 billion), followed by Germany (US\$ 28 billion), the United Kingdom (US\$ 27 billion) and China (US\$ 26 billion). Turkey (US\$ 16 billion) climbs one position to 8th, changing places with Austria (US\$ 15 billion). Australia (US\$ 13 billion) closes the list, entering among the first 10 in 2004.

International Tourist Arrivals (million)							International Tourism Receipts (US\$ billion)							
Rank	Series	2003		Change (%)		Share 2004*	Rank	2003		Change (%)		Share 2004*		
		2003	2004*	03/02	04*/03			2003	2004*	03/02	04*/03			
	World	690	763	-1.5	10.7	100		World	524	623	0.2	12.7	100	
1	France	TF	75.0	75.1	-2.6	0.1	9.8	1	United States	64.3	74.5	-3.4	15.7	12.0
2	Spain	TF	51.8	53.6	-0.9	3.4	7.0	2	Spain	39.6	45.2	4.4	3.8	7.3
3	United States	TF	41.2	46.1	-5.4	11.8	6.0	3	France	36.6	40.8	-5.4	1.5	6.6
4	China	TF	33.0	41.8	-10.4	26.7	5.5	4	Italy	31.2	35.7	-2.1	3.8	5.7
5	Italy	TF	39.6	37.1	-0.5	-6.4	4.9	5	Germany	23.1	27.7	0.4	8.9	4.4
6	United Kingdom	VF	24.7	27.8	2.2	12.3	3.6	6	United Kingdom	22.7	27.3	2.1	7.5	4.4
7	Hong Kong (China)	VF	15.5	21.8	-6.2	40.4	2.9	7	China	17.4	25.7	-14.6	47.9	4.1
8	Mexico	TF	18.7	20.6	-5.1	10.5	2.7	8	Turkey	13.2	15.9	10.5	14.3	2.6
9	Germany	TCE	18.4	20.1	2.4	9.5	2.6	9	Austria	14.0	15.4	3.8	0.4	2.5
10	Austria	TCE	19.1	19.4	2.5	1.5	2.5	10	Australia	10.3	13.0	0.8	10.7	2.1

Source: World Tourism Organization (WTO) ©

(Data as collected by WTO 2005)

World's Top

Tourism

Destinations

Regional Results

Europe - buoyant emerging destinations in a stable region

In a context of a double-digit world tourism revival, Europe reports the lowest result of all regions, although it has to be taken into account that Europe, unlike the Americas and Asia and the Pacific, also posted positive results in 2002 and 2003. International tourist arrivals grew by 5%, driven by the comparatively solid performance of countries in Central and Eastern Europe (+15%) and in Northern Europe (+9%). In Northern Europe growth was particularly strong in the UK as the country saw traffic improve considerably from both Europe and from the overseas markets. In Central and Eastern Europe, the exchange rate advantage, as well as the positive factors emerging from the entry of the 10 new members in the European Union (EU), determined positive growth rates in almost all major destinations. By contrast, results were significantly more modest in Southern and Mediterranean Europe (+2%) and in Western Europe (+2%). In Western Europe, while some major destinations show growth rates of around 2% to 5% (Austria and the Netherlands), Germany grew by a significant 10%, whereas France saw arrivals stagnate (+0.1%). The more mature destinations in the euro zone were particularly affected by increased competition from non-euro destinations, not only in Europe, but also in North Africa (Morocco and Tunisia) and the Middle East (Egypt), as well as from long-haul destinations in the Americas (North America and the Caribbean) and in Asia and the Pacific. Established destinations, such as Italy (-6%), France (+0.1%) and Portugal (-0.8%) recorded comparatively feeble results. The exception in this context was Spain, which, in spite of the strong euro and of the tragic events of 11 March in Madrid, saw tourist arrivals grow by more than 3%. On the other hand, major emerging holiday destinations outside the euro zone, such as Turkey (+26%), Slovenia (+9%) and Croatia (+7%), did particularly well. The relative improvement of the security situation between Israel and Palestine, and the weak US dollar, contributed to the extraordinary results of Israel (+42%).

Major destinations	Series ¹	International Tourist Arrivals					International Tourism Receipts				
		(1000)		Change (%)		Share (%)	(US\$ million)		Change (%)		Share (%)
		2003	2004*	2003/02	2004*/03	2004*	2003	2004*	2003/02	2004*/03	2004*
Europe		396,579	416,362	0.6	5.0	100	282,913	326,693	17.3	15.5	100
Austria	TCE	19,078	19,373	2.5	1.5	4.7	13,954	15,351	24.2	10.0	4.7
Belgium	TCE	6,690	6,710	-0.4	0.3	1.6	8,168	9,185	18.1	12.4	2.8
Croatia	TCE	7,409	7,912	6.7	6.8	1.9	6,376	7,074	67.3	10.9	2.2
Czech Rep	TCE	5,076	6,061	10.8	19.4	1.5	3,556	4,169	20.9	17.2	1.3
France	TF	75,048	75,121	-2.6	0.1	18.0	36,593	40,842	13.2	11.6	12.5
Germany	TCE	18,392	20,137	2.4	9.5	4.8	23,106	27,657	20.1	19.7	8.5
Greece	TF	13,969	-	-1.5	-	-	10,741	12,872	10.4	19.8	3.9
Hungary	TF	-	12,212	-	-	2.9	4,046	4,061	9.0	0.4	1.2
Ireland	TF	6,764	6,982	4.4	3.2	1.7	3,873	4,279	25.4	10.5	1.3
Italy	TF	39,604	37,071	-0.5	-6.4	8.9	31,245	35,656	17.1	14.1	10.9
Netherlands	TCE	9,181	9,646	-4.3	5.1	2.3	9,160	10,260	18.9	12.0	3.1
Norway	TCE	3,269	3,600	5.1	10.1	0.9	2,659	3,087	22.0	16.1	0.9
Poland	TF	13,720	14,290	-1.9	4.2	3.4	4,060	5,828	-4.9	43.5	1.8
Portugal	TF	11,707	11,617	0.5	-0.8	2.8	6,575	7,788	14.8	18.4	2.4
Russian Fed.	TF	8,521	9,164	7.3	7.5	2.2	4,501	5,226	8.0	16.1	1.6
Spain	TF	51,830	53,599	-0.9	3.4	12.9	39,645	45,248	24.9	14.1	13.9
Sweden	TCE	2,952	3,003	-1.3	1.7	0.7	5,297	6,167	13.1	16.4	1.9
Switzerland	TCE	6,530	-	-4.9	-	-	9,186	10,413	16.7	13.4	3.2
Turkey	TF	13,341	16,826	4.3	26.1	4.0	13,203	15,888	10.9	20.3	4.9
Ukraine	TF	12,514	15,629	19.0	24.9	3.8	935	1,141	18.7	22.0	0.3
United Kingdom	VF	24,715	27,755	2.2	12.3	6.7	22,656	27,299	11.2	20.5	8.4

Source: World Tourism Organization (WTO) ©

(Data as collected by WTO 2005)

2004 was definitely the year of full recovery in Asia and the Pacific as the region achieved growth of 28%, receiving an estimated volume of 153 million tourist arrivals. Following the trend already seen in the last months of 2003, most of the destinations in North-East and South-East Asia rebounded very strongly from the SARS fall-out, leading both subregions to end the year with an increase of around 30%. While the end of the SARS panic and the better economic conditions in major generating markets such as Japan triggered intraregional travel, interregional travel from Europe and from the Americas was stimulated by comparatively favourable exchange rates as many regional currencies are rather closely linked to the US dollar. Intraregional traffic was also further boosted by easier border facilities and the general expansion of air capacity, fuelled by a boom of low-cost airlines.

International tourist arrivals to North-East Asia grew by 30% with major SARS affected destinations fully recovering the losses of 2003 in terms of both arrivals and tourism receipts. Destinations beat records almost without exception. In China, the recovery in inbound tourism was fully accomplished with a 27% increase in tourist arrivals to a total of almost 42 million, thus amply surpassing 2002 figures. The good evolution of the Chinese outbound market was crucial to the performances of Hong Kong (China) (+40%) and Macao (China) (+32%). All other destinations in the subregion also grew at double-digit rates. Japan, with an increase of 18% reached its highest tourist-arrival figure ever (6.1 million), the Republic of Korea grew by 22% and Taiwan (pr. of China) by 31%. The rebound was even stronger in South-East Asia, where arrivals jumped by 31% after losses of almost 14% in 2003. Particularly exceptional growth rates were achieved in Cambodia (+51%) and Malaysia (+49%). All other destinations grew around 20%.

Destinations of South Asia (+17%), on the other hand, maintained momentum after the already sound results obtained in 2003 (+10%). Tourism to the subregion grew to a total of approximately 8 million arrivals for the first time, driven in particular by the results registered by India (+24%), Sri Lanka (+13%) and Maldives (+9%). International tourist arrivals to Oceania grew by 13% to more than 10 million. Inbound tourism to major destinations rebounded due in particular to the increase in air capacity and competitive airfares, which also contributed to the development of domestic tourism. Arrivals to New Zealand grew by 12%, while visitor arrivals to Australia (+10%) surpassed the 5 million mark (including some 9% of same-day visitors), thus breaking the 4.9 million record set in the 2000 Olympic Year.

Major destinations	Series ¹	International Tourist Arrivals					International Tourism Receipts				
		(1000)		Change (%)		Share (%)	(US\$ million)		Change (%)		Share (%)
		2003	2004*	2003/02	2004*/03	2004*	2003	2004*	2003/02	2004*/03	2004*
Asia and the Pacific		119,255	152,543	-9.0	27.9	100	94,855	124,973	-4.3	31.8	100
Australia	TF	4,354	-	-1.5	-	-	10,318	12,952	20.3	25.5	10.4
China	TF	32,970	41,761	-10.4	26.7	27.4	17,406	25,739	-14.6	47.9	20.6
Guam	TF	910	1,160	-14.1	27.5	0.8	-	-	-	-	-
Hong Kong (China)	VF	15,537	21,811	-6.2	40.4	14.3	7,137	9,007	-5.4	26.2	7.2
India	TF	2,726	3,371	14.4	23.6	44.9	3,533	4,769	21.1	35.0	65.0
Indonesia	TF	4,467	5,321	-11.3	19.1	3.5	4,037	4,798	-23.6	18.8	3.8
Iran	TF	1,546	1,659	-2.5	7.3	22.1	1,033	1,074	-23.9	4.0	14.6
Japan	TF	5,212	6,138	-0.5	17.8	4.0	8,817	11,202	-	27.1	9.0
Korea Republic of	VF	4,753	5,818	-11.1	22.4	3.8	5,343	5,697	-9.7	6.6	4.6
Macao (China)	TF	6,309	8,324	-3.9	31.9	5.5	5,128	7,452	20.0	45.3	6.0
Malaysia	TF	10,577	15,703	-20.4	48.5	10.3	5,901	8,198	-17.1	38.9	6.6
New Zealand	VF	2,104	2,348	2.9	11.6	1.5	3,979	4,951	31.1	24.4	4.0
Philippines	TF	1,907	2,291	-1.3	20.2	1.5	1,545	2,012	0.0	30.2	1.6
Singapore	TF	5,705	-	-18.5	-	-	3,787	5,090	-14.6	34.4	4.1
Taiwan (pr. of China)	VF	2,248	2,950	-24.5	31.2	1.9	2,977	4,040	-35.0	35.7	3.2
Thailand	TF	10,004	11,651	-8.0	16.5	7.6	7,828	10,034	-1.0	28.2	8.0

Source: World Tourism Organization (WTO) ©

(Data as collected by WTO 2005)

Regional Results

Americas - back on the growth track with a revival of the US

2004 was the year that finally brought tourism in the Americas back to growth, leaving behind three years of depressed figures. International tourist arrivals increased by 11% to a total of almost 126 million, with all subregions performing positively. The major change of trend came from North America, where international tourist arrivals grew by 11% after three negative years, while receipts rebounded even stronger. The overall volume, though, with an estimated number of 86 million international tourist arrivals in 2004, is still below the level of 92 million arrivals of 2000. The best results were reported by the US (+12%). In Canada, results also picked up significantly (+9%) when compared to SARS-troubled 2003. Mexico, with a 10% increase, benefited from the growing demand in the European market, where a strong euro made trips to the country more affordable, and from its continued popularity in the US market. In Central America, all major destinations report double-digit results. Guatemala enjoyed a spectacular 34% increase; Costa Rica grew by 17%, and Panama and El Salvador by 15% and 13% respectively. In South America, all destinations with data available also report double-digit growth rates, except for Ecuador (+4%), which may have suffered from the more severe border control in arrivals from Colombia and from the increase of prices after "dollarization". Both Argentina (+12%) and Brazil (+16%) benefited from the improving economic situation. They not only contributed to each other's performance, but also to the good results of nearby countries such as Uruguay (+24%), Chile (+11%) and Paraguay (+15%) due to their importance as traffic generators in these destinations. In the Caribbean, growth was less impressive than in the other American subregions, but at a still significant 7%. Destinations benefited from increased traffic from the US, Canada and Europe under the effect of a favourable exchange rate and of the perception that the Caribbean is a "safe" destination. Arrivals to Cuba and to Puerto Rico both grew by more than 9%. Other major destinations such as the Dominican Republic (+5%), Jamaica (+5%) and the Bahamas (+3%) all grew around or somewhat below the average for the subregion.

Major destinations	Series ¹	International Tourist Arrivals					International Tourism Receipts				
		(1000)		Change (%)		Share (%)	(US\$ million)		Change (%)		Share (%)
		2003	2004*	2003/02	2004*/03	2004*	2003	2004*	2003/02	2004*/03	2004*
Americas		113,093	125,757	-3.0	11.2	100	114,105	131,682	0.3	15.4	100
Argentina	TF	2,995	3,353	6.2	12.0	2.7	2,006	2,563	31	28	1.9
Bahamas	TF	1,510	1,561	-0.2	3.4	1.2	1,757	1,884	0	7	1.4
Brazil	TF	4,091	4,725	8.1	15.5	3.8	2,479	3,222	24	30	2.4
Canada	TF	17,534	19,150	-12.6	9.2	15.2	10,546	12,843	-1.4	21.8	9.8
Chile	TF	1,614	1,785	14.3	10.6	1.4	1,091	1,091	0.0	0.0	0.8
Costa Rica	TF	1,239	1,453	11.3	17.3	1.2	1,199	1,358	11.3	13.3	1.0
Cuba	TF	1,847	2,017	11.5	9.2	1.6	1,846	1,915	13.0	3.7	1.5
Dominican Rp	TF	3,282	3,450	16.8	5.1	2.7	3,110	3,180	13.7	2.3	2.4
Jamaica	TF	1,350	1,415	6.6	4.8	1.1	1,355	1,437	12.1	6.1	1.1
Mexico	TF	18,665	20,618	-5.1	10.5	16.4	9,362	10,753	5.7	14.9	8.2
Peru	TF	1,024	1,203	18.8	17.5	1.0	940	1,078	17.3	14.7	0.8
Puerto Rico	TF	3,238	3,541	4.9	9.4	2.8	2,677	3,024	7.7	13.0	2.3
United States	TF	41,218	46,077	-5.4	11.8	36.6	64,348	74,481	-3.4	15.7	56.6
Uruguay	TF	1,420	1,756	12.9	23.7	1.4	345	455	-1.8	31.9	0.3

Source: World Tourism Organization (WTO) ©

(Data as collected by WTO 2005)

Africa - growth fuelled by Northern destinations

Regional Results

In Africa (+8%), 2004 was a particular buoyant year for destinations in the North, which with a 15% increase rate contributed decisively to the overall growth registered in the region, as the performance of Sub-Saharan destinations was more modest. Tourist arrivals grew by 16% in Morocco under the impact of the policy of liberalization of air transport, which opened the destination to low-cost airlines and decreased prices. Tunisia reports an increase of 17% in tourist arrivals as the strong euro improved its competitiveness in the European generating markets when compared to other sun-and-sea destinations in the euro zone. In the South, the strengthening of the rand constrained the results of South Africa (+3%). On the other hand, Kenya (+31%) bounced back strongly on the weak 2003, fostered by a significant increase in air capacity from the main European generating markets, improvement of the tourism product and enhanced tourism promotion.

Major destinations	Series ¹	International Tourist Arrivals					International Tourism Receipts				
		(1000)		Change (%)		Share (%)	(US\$ million)		Change (%)		Share (%)
		2003	2004*	2003/02	2004*/03	2004*	2003	2004*	2003/02	2004*/03	2004*
Africa		30,763	33,222	4.3	8.0	100	15,494	18,335	30.8	18.3	100
Algeria	VF	1,166	1,234	18.0	5.8	3.7	112	-	1.8	-	-
Botswana	TF	975	-	-5.9	-	-	457	549	43.1	20.2	3.0
Ghana	TF	483	-	-0.1	-	-	414	-	15.6	-	-
Kenya	TF	866	1,132	3.4	30.7	3.4	339	495	22.9	45.9	2.7
Mauritius	TF	702	719	3.0	2.4	2.2	696	853	13.8	22.5	4.7
Morocco	TF	4,761	5,501	10.7	15.5	16.6	3,225	3,921	21.9	21.6	21.4
Namibia	TF	695	-	-8.2	-	-	330	403	51.5	22.1	2.2
Reunion	TF	432	430	1.4	-0.5	1.3	413	448	25.7	8.5	2.4
Seychelles	TF	122	121	-7.7	-1.0	0.4	171	172	4.1	0.3	0.9
Tanzania	TF	552	566	0.4	2.5	1.7	450	595	2.5	32.1	3.2
South Africa	VF	6,640	6,815	1.4	2.6	20.5	5,144	5,648	76.8	9.8	30.8
Tanzania	TF	552	566	0.4	2.5	1.7	450	595	2.5	32.1	3.2
Tunisia	TF	5,114	5,998	1.0	17.3	18.1	1,582	1,910	3.9	20.7	10.4
Zambia	TF	578	-	2.2	-	-	149	-	11.2	-	-
Zimbabwe	VF	2,256	1,854	10.5	-17.8	5.6	61	194	-19.7	217.5	1.1

Source: World Tourism Organization (WTO) ©

(Data as collected by WTO 2005)

Middle East - tourism boom induced by supportive policies and investment

In the Middle East tourism continues to be one of the most dynamic economic sectors. The support of most governments, the permanent development of tourism infrastructures and significant public and private sector investment in tourism, the low-cost airline phenomenon and the increasing cooperation regarding border facilities among the countries in the region are all reinforcing intraregional as well as domestic traffic. Arrivals grew by an estimated 18% to a total of over 35 million, which makes the region the 4th most visited in the world, thus surpassing for the first time the volume of Africa (estimated to have received 33 million arrivals in 2004). All countries with data available show positive results without exception. The biggest increase in absolute terms was recorded by Egypt, which saw visitor arrivals increase by more than 2 million arrivals (+34%) to over 6 million (including some 5% of same-day visitors). The country benefited, like other sun-and-sea destinations in North Africa and in "non-euro" Europe, from the strength of the euro zone currency. Furthermore, Lebanon enjoyed a considerable increase (+26%) on the already positive trend experienced in 2003, while Jordan (+21%) rebounded convincingly on the losses of 2003. Saudi Arabia reported an increase of 17%, in line with the regional average.

Major destinations	Series ¹	International Tourist Arrivals					International Tourism Receipts				
		(1000)		Change (%)		Share (%)	(US\$ million)		Change (%)		Share (%)
		2003	2004*	2003/02	2004*/03	2004*	2003	2004*	2003/02	2004*/03	2004*
Middle East		29,999	35,391	2.9	18.0	100	16,836	21,005	7.5	24.8	100
Bahrain	TF	2,955	-	-6.7	-	-	740	-	0.0	-	-
Egypt	TF	5,746	-	17.1	-	-	4,584	6,125	21.8	33.6	29.2
Jordan	TF	2,353	2,853	-1.3	21.2	8.1	848	826	7.9	-2.7	3.9
Lebanon	TF	1,016	1,278	6.3	25.8	3.6	1,016	1,278	6.3	25.8	6.1
Saudi Arabia	TF	7,332	8,580	-2.4	17.0	24.2	5,661	6,542	-2.3	15.6	31.1
Syrian Arab Republ.	TCE	2,788	3,032	-2.9	8.8	8.6	1,408	2,220	-1.1	57.7	10.6
Utd Arab Emirates	THS	5,871	-	7.8	-	-	1,438	1,593	8.0	10.8	7.6

Source: World Tourism Organization (WTO) ©

(Data as collected by WTO 2005)

Outbound tourism by generating regions – long-haul back to growth

By far most international travel takes place within the same region, some four-fifths of the total. After having contracted for three years in a row, long-haul travel recovered in 2004 (+13%) and outgrew intraregional travel (+10%). This is in line with the long-term trend as in normal circumstances travel between regions tends to grow at a somewhat faster pace than intraregional travel, while between 2001 and 2003 the situation had been the opposite.

As for source markets, international tourism is still relatively concentrated in the industrialized countries of Europe, the Americas and 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 North-East and South-East Asia, Central and Eastern Europe, the Middle East and Southern Africa. In 2004, most markets rebounded strongly on the depressed results of 2003. By region, Asia and the Pacific (+25%) and the Middle East (+23%) recorded the biggest gains. In absolute numbers Asia and the Pacific generated some 30 million international arrivals more than in 2003, or 20 million compared to 2002. The Americas (+11%) finally returned to positive growth after three years of decreases, but is still short of the record of 2000. Europe grew by 6% and is the only region that also showed positive growth in 2003 and in the two preceding years. Africa generated 4% more arrivals.

	International Tourist Arrivals (millions)							Change (%)		Share (%)
	1990	1995	2000	2001	2002	2003	2004*	2003/02	2004*/03	2004*
World	440.6	538.1	680.6	680.4	700.4	689.7	763.3	-1.5	10.7	100
From:										
Europe	252.5	307.2	389.5	390.4	401.6	406.7	431.3	1.3	6.0	56.5
Asia and the Pacific	59.8	88.8	118.3	120.6	130.8	120.6	151.2	-7.8	25.4	19.8
Americas	99.3	108.0	130.7	125.5	121.2	115.4	127.7	-4.8	10.6	16.7
Middle East	8.5	10.4	15.2	16.3	18.3	17.9	22.0	-2.0	22.8	2.9
Africa	9.9	13.0	16.5	16.5	17.6	17.6	18.2	-0.2	3.8	2.4
Origin not specified*	10.6	10.8	10.5	11.2	10.9	11.5	12.9			1.7
Same region	351.9	430.5	537.9	546.0	566.8	560.2	617.2	-1.2	10.2	80.9
Other regions	78.0	96.8	132.2	123.3	122.7	118.0	133.2	-3.9	12.9	17.4

Source: World Tourism Organization (WTO) ©

(Data as collected by WTO 2005)

* 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 separately specified.

International Tourism Top Spenders

In 2004, Germany kept the first position in the ranking of the world's top tourism spenders, won in 2003 from the United States. It is important to note, however, that these results as expressed in US dollars are much influenced by the exchange rate between the euro and the US dollar, which similarly to last year clearly was favourable to the eurozone currency. Consequently, in spite of the recovery of US tourism expenditure (+14%) after three negative years, the US maintain the second post. On the other hand, as a reflection of the sliding US dollar, expenditure on international tourism by German residents expressed in US dollars increased by nearly 10%, while expenditure in euro terms stagnated (-0.2%) at 57 billion euros. Likewise, other European source markets as well as Canada had apparently substantial increases in international tourism expenditure as expressed in dollars, which in terms of local currency were more modest.

Rank		International Tourism Expenditure (US\$ billion)		Change ¹ (%)		Share (%)	Population 2004	Expenditure per capita
		2003	2004*	2003/2002	2004*/2003	2004*	(million)	(US\$)
	World	524	623	0.2	12.7	100	6,373	98
1	Germany	64.7	71.0	3.0	-0.2	11.4	82	861
2	United States	57.4	65.6	-2.2	14.3	10.5	293	224
3	United Kingdom	47.9	55.9	6.0	4.1	9.0	60	928
4	Japan	28.8	38.1	0.5	23.5	6.1	127	299
5	France	23.4	28.6	0.6	11.1	4.6	60	474
6	Italy	20.6	20.5	2.4	-9.4	3.3	58	354
7	Netherlands	14.6	16.5	-5.5	3.0	2.7	16	1,014
8	Canada	13.4	16.0	2.6	10.8	2.6	33	493
9	Russian Federation	12.9	15.7	11.7	14.7	2.5	144	109
10	China	15.2	-	-1.4	-	-	1,299	12

Source: World Tourism Organization (WTO) ©

(Data as collected by WTO 2005)

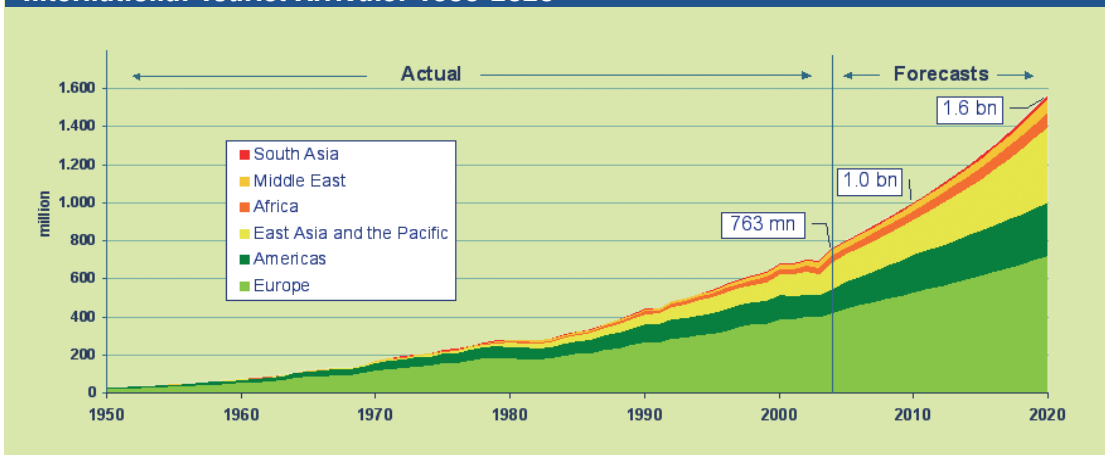
¹ Local currencies, current prices

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 to 2003). 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.



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).



Tourism Market Trends, 2004 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 2004 Edition of the series examines short- and medium-term tourism development through 2003 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: 2005
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 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
Volume 7, Global Forecasts and Profiles of Market Segments: Available in English, French and Spanish



City Tourism & Culture - The European Experience

'City Tourism & Culture: The European Experience', is a new report commissioned jointly by the World Tourism Organization (WTO) and European Travel Commission (ETC), which presents a new insight into the expansion of European cities as cultural tourism destinations. Besides, defining a conceptual framework for the analysis of city tourism with a cultural motivation, the study aims to contribute to the marketing and product development of city tourism by throwing more light on the evolution of cultural tourism in Europe from 'traditional' to 'innovative'.

Based on the concepts of 'heritage', 'cultural' and 'creative' cities, the study clusters destinations according to their predominant cultural product, and analyses their recent performance and positioning as well as their opportunities for future growth. The Report 'City Tourism & Culture: the European Experience' includes, moreover, a complete set of data and information on the recent performance of city tourism, on consumers' profiles, and on trends in terms of generating markets, destination countries, travel patterns and preferred activities undertaken in the destinations.

Published: January 2005
Price: € 30
Available in English



Evaluating NTO Marketing Activities

"Evaluating NTO Marketing Activities" is the first comprehensive guide for National Tourist Offices (NTOs) on how to evaluate the effectiveness of their marketing activities. Based on the results of a survey on current evaluation practices among NTOs, the study compares different evaluation methodologies in terms of best practices and presents an extensive analysis of the research carried out on the subject. It provides a guide for the evaluation of the marketing activities of NTOs, setting out a number of practical steps.

Published: December 2003
Price: € 45
Available in English and Spanish



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



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

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