

Tourism Highlights

2008 Edition



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International Tourism

International tourism – a key driver for the world economy

Over the past six decades, tourism has experienced continued growth and diversification to become one of the largest and fastest growing economic sectors in the world. Over time, more and more destinations have opened up and invested in tourism development, turning modern tourism into a key driver for socio-economic progress.

Tourism has become one of the major international trade categories. Today, the export income generated by international tourism ranks fourth after fuels, chemicals and automotive products. For many developing countries, it is one of the main income sources and the number one export category, creating much needed employment and opportunities for development.

Key figures:

- From 1950 to 2007, international tourist arrivals grew from 25 million to 903 million.
- The overall export income generated by these arrivals (international tourism receipts and passengers transport) grew at a similar pace, outgrowing the world economy, exceeding US\$ 1 trillion in 2007, or almost US\$ 3 billion a day.
- While, in 1950, the top 15 destinations absorbed 98% of all international tourist arrivals, in 1970 the proportion was 75%, and this fell to 57% in 2007, reflecting the emergence of new destinations, many of them in developing countries.

Current developments and forecasts:

- Worldwide, international tourist arrivals reached 903 million in 2007, up 6.6% on 2006.
- Between 1995 and 2007 growth averaged over 4% a year, in spite of the stagnation between 2001 and 2003 due to terrorism, SARS and the economic downturn.
- International tourism receipts rose to US\$ 856 billion (625 billion euros) in 2007, corresponding to an increase in real terms of 5.6% on 2006.
- Outbound tourism in recent years has been increasingly driven by emerging source markets.
- According to the *UNWTO World Tourism Barometer* of June 2008, tourism demand held up quite well in the first four months of 2008. Overall, international tourist arrivals grew at around 5% between January and April 2008 compared with the same period of 2007.
- For the whole of 2008, a softening of growth is anticipated, due to the uncertainties posed by the global economy affecting consumer confidence and constraining disposable income.
- By 2010 international arrivals are expected to reach 1 billion, and 1.6 billion by 2020.

Inbound Tourism, 1990-2007



Source: World Tourism Organization (UNWTO) ©

Inbound Tourism by month

International Tourist Arrivals (million)



Source: World Tourism Organization (UNWTO) ©

Tourism Highlights is a publication from the World Tourism Organization (UNWTO), released annually on the occasion of World Tourism Day – on 27 September – celebrated, in 2008, in Peru under the theme 'Tourism Responding to the Challenge of Climate Change'. *Tourism Highlights* aims to provide a consolidated set of data and trends for international tourism in the year prior to its date of publication. For information on actual short-term tourism data and trends, please refer to the *UNWTO World Tourism Barometer* at www.unwto.org/facts/eng/barometer.htm.

The World Tourism Organization is a specialized agency of the United Nations and the leading international organization in the field of tourism. It serves as a global forum for tourism policy issues and a practical source of tourism know-how. Its membership includes 160 countries and territories and more than 350 Affiliate Members representing local governments, tourism associations and private sector companies including airlines, hotel groups and tour operators.

2007 – world tourism performs above expectations

In 2007, international tourist arrivals grew by 6.6% to reach a new record figure of over 900 million – an extraordinary achievement given that the 800 million mark was only reached two years earlier. This represented 56 million more arrivals than in 2006, well over the total count for either the Middle East or Africa. In fact, world tourism enjoyed its fourth consecutive year of growth in 2007 above the long-term forecast of 4.1% and, surprisingly, it even exceeded the 5.5% increases recorded in 2005 and 2006.

All regions registered increases above their long-term average, with the Middle East leading the growth ranking, with an estimated 16% rise to nearly 48 million international tourist arrivals. In second place came Asia and the Pacific (184 million) with +10% over 2006. Africa's international tourist arrivals increased by 7% to 44 million arrivals. The Americas (+5%) did better than in previous years, achieving over 142 million arrivals. Europe, the world's largest destination region, with a share of 54% of all international tourist arrivals, grew by 5% to reach 484 million.

Simultaneously, international tourism receipts grew to US\$ 856 billion (625 billion euros) in 2007, corresponding to an increase in real terms of 5.6% over 2006. Receipts from international passenger transport are estimated at US\$ 165 billion, bringing the total international tourism receipts including international passenger transport (i.e. visitor exports) to over US\$ 1 trillion, corresponding to almost US\$ 3 billion a day.

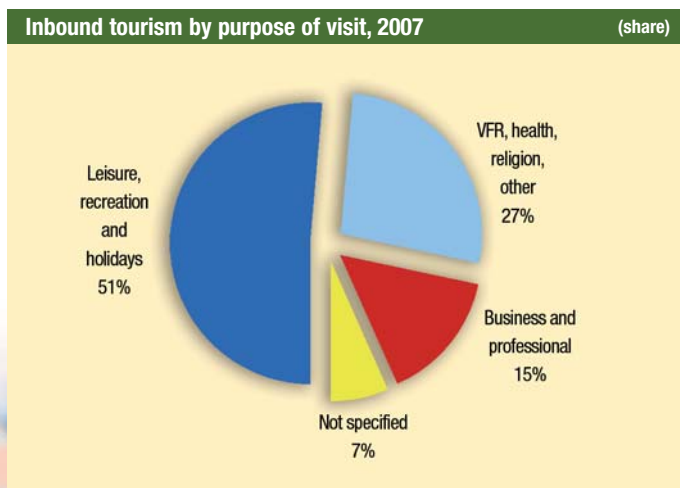
Purpose of visit and means of transport

In 2007, just over half of all international tourist arrivals were motivated by leisure, recreation and holidays (51%) – a total of 458 million. Business travel accounted for some 15% (138 million), and 27% represented travel for other purposes, such as visiting friends and relatives (VFR), religious reasons/pilgrimages, health treatment, etc. (240 million). The purpose of visit for the remaining 7% of arrivals was not specified.

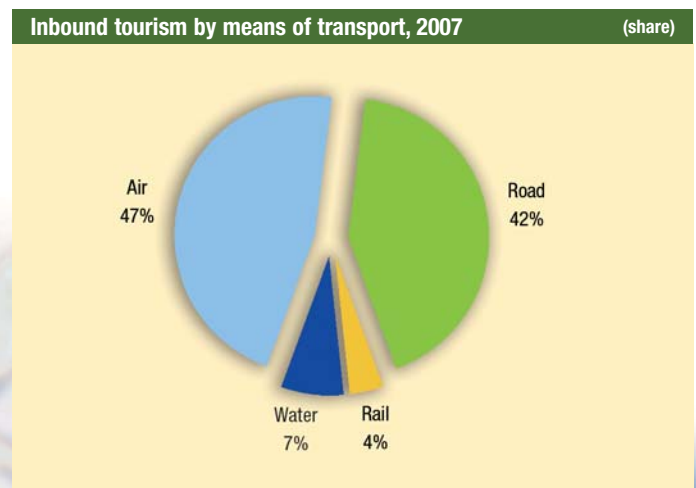
Slightly less than half of arrivals travelled by air transport (47%) in 2007, while the remainder arrived in their destinations by surface transport (53%) – whether by road (42%), rail (4%) or over water (7%). Over time, the trend has been for air transport to grow at a faster pace than surface transport, so the share of air transport is gradually increasing.

Overview

International Tourism, 2007



Source: World Tourism Organization (UNWTO) ©



Source: World Tourism Organization (UNWTO) ©

International Tourist Arrivals by (Sub) region

	International Tourist Arrivals (million)						Market share (%) 2007*	Change (%)		Average annual growth (%) '00-'07*
	1990	1995	2000	2005	2006	2007*		06/05	07*/06	
World	436	536	683	803	847	903	100	5.5	6.6	4.1
Europe	262.6	311.3	393.5	440.3	462.2	484.4	53.6	5.0	4.8	3.0
Northern Europe	28.6	35.8	43.7	52.8	56.4	57.6	6.4	6.8	2.2	4.0
Western Europe	108.6	112.2	139.7	142.4	149.5	154.9	17.1	5.0	3.6	1.5
Central/Eastern Europe	31.5	60.6	69.4	87.8	91.5	95.6	10.6	4.2	4.5	4.7
Southern/Mediter. Eu.	93.9	102.7	140.8	157.3	164.8	176.2	19.5	4.7	7.0	3.3
Asia and the Pacific	55.8	81.8	109.3	154.6	167.0	184.3	20.4	8.0	10.4	7.8
North-East Asia	26.4	41.3	58.3	87.5	94.3	104.2	11.5	7.7	10.6	8.6
South-East Asia	21.1	28.2	35.6	48.5	53.1	59.6	6.6	9.4	12.2	7.6
Oceania	5.2	8.1	9.2	10.5	10.5	10.7	1.2	0.4	1.7	2.2
South Asia	3.2	4.2	6.1	8.1	9.1	9.8	1.1	11.8	8.2	7.1
Americas	92.8	109.0	128.2	133.4	135.8	142.5	15.8	1.9	4.9	1.5
North America	71.7	80.7	91.5	89.9	90.6	95.3	10.6	0.8	5.2	0.6
Caribbean	11.4	14.0	17.1	18.8	19.4	19.5	2.2	3.4	0.1	1.9
Central America	1.9	2.6	4.3	6.4	7.1	7.7	0.9	9.9	9.6	8.6
South America	7.7	11.7	15.3	18.2	18.7	19.9	2.2	2.8	6.4	3.9
Africa	15.2	20.1	27.9	37.3	41.4	44.4	4.9	11.0	7.4	6.9
North Africa	8.4	7.3	10.2	13.9	15.1	16.3	1.8	8.4	7.9	6.8
Subsaharan Africa	6.8	12.8	17.7	23.3	26.3	28.2	3.1	12.6	7.1	6.9
Middle East	9.6	13.7	24.4	37.8	40.9	47.6	5.3	8.2	16.4	10.0

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2008)

International Tourism Receipts by (Sub) region

Receipts from international tourism up by 5.6%

For many destinations, visitor expenditure on accommodation, food and drink, local transport, entertainment, shopping, etc. is an important pillar of their economies, creating much needed employment and opportunities for development. Nearly 80 countries earned more than US\$ 1 million from international tourism in 2007.

UNWTO estimates that worldwide receipts from international tourism reached US\$ 856 billion (625 billion euros) in 2007. In absolute terms, international tourism receipts increased by US\$ 114 billion, but only by 34 billion in euros due to the devaluation of the US dollar against several world currencies and, in particular, the euro.

In real terms, i.e. adjusted for exchange rate fluctuations and inflation, growth in international tourism receipts reached 5.6%. With this increase, international tourism revenues maintained the momentum of 2006 (+5.1%) and added to a series of four consecutive years of substantial growth.

	International Tourism Receipts (billion)						Change current prices (%)			Change constant prices (%)		
	1990	1995	2000	2005	2006	2007*	05/04	06/05	07*/06	05/04	06/05	07*/06
Local currencies							6.3	8.5	9.1	3.1	5.1	5.6
US\$	264	405	475	680	742	856	7.3	9.2	15.4	3.8	5.8	12.1
Euro	207	310	515	546	591	625	7.3	8.2	5.7	5.0	5.9	3.5

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2008)

By region, the relative growth in real terms was particularly strong in Asia and the Pacific (+11%) – at double the world average – in Africa (+8%) and in the Americas (+6%). The performance of the Americas was a significant improvement over the previous year's 2% growth. In terms of subregions, the strongest increases came from South-East Asia (+13%) and North-East Asia (+12%), followed by Central America, North Africa and Central and Eastern Europe (all three at +9%). Only one subregion, the Caribbean, did not increase its receipts in 2007 (-0.4%), largely as a result of a stagnation in arrivals.

International Tourism Receipts	Change			Share (%) 2007*	US\$			Euro		
	local currencies, constant prices (%)				Receipts		Receipts		Receipts	
	05/04	06/05	07*/06		(billion)	per arrival	(billion)	per arrival	(billion)	per arrival
					2006	2007*	2007	2006	2007*	2007
World	3.1	5.1	5.6	100	742	856	950	591	625	690
Europe	1.7	3.9	2.7	50.6	376.9	433.4	890	300.2	316.2	650
Northern Europe	8.4	7.7	3.9	8.1	60.3	69.7	1,210	48.0	50.8	880
Western Europe	-0.2	3.7	2.1	17.4	131.6	149.1	960	104.8	108.8	700
Central/Eastern Europe	0.1	8.2	8.6	5.6	38.2	48.3	510	30.4	35.3	370
Southern/Mediter. Eu.	1.4	1.6	1.1	19.4	146.9	166.4	940	117.0	121.4	690
Asia and the Pacific	4.2	11.1	11.4	22.1	156.5	188.9	1,020	124.7	137.9	750
North-East Asia	7.9	12.1	12.5	10.4	75.2	89.2	860	59.9	65.1	620
South-East Asia	0.0	16.0	13.0	6.3	43.6	54.0	910	34.7	39.4	660
Oceania	1.0	2.5	8.1	3.8	26.6	32.3	3,020	21.2	23.6	2,200
South Asia	4.1	10.7	5.4	1.6	11.2	13.4	1,370	8.9	9.8	1,000
Americas	4.3	1.8	6.4	20.0	154.1	171.1	1,200	122.7	124.9	880
North America	4.5	0.8	7.4	14.6	112.5	125.1	1,310	89.6	91.3	960
Caribbean	3.3	1.9	-0.4	2.6	21.7	22.6	1,160	17.3	16.5	850
Central America	9.3	10.3	8.9	0.7	5.5	6.3	810	4.4	4.6	590
South America	2.0	6.8	8.0	2.0	14.4	17.2	860	11.5	12.5	630
Africa	10.9	10.5	7.5	3.3	24.6	28.3	640	19.6	20.6	460
North Africa	15.3	19.1	8.7	1.2	8.7	10.3	640	6.9	7.5	460
Subsaharan Africa	8.8	6.5	6.9	2.1	15.9	18.0	640	12.7	13.1	470
Middle East	2.5	3.6	6.3	4.0	29.9	34.2	720	23.8	25.0	520

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2008)

For destination countries, receipts from international tourism count as exports and cover transactions generated by same-day as well as overnight visitors. However, these do not include receipts from international passenger transport contracted from companies outside the travellers' countries of residence, which are reported in a separate category, 'International Passenger Transport'. Although the availability of comparable international data is somewhat limited, the export value of international passenger transport has in recent years been estimated at around 16% of the combined receipts from international tourism and passenger transport, corresponding in 2007 to some US\$ 165 billion against US\$ 143 billion in 2006.

This takes total receipts from international tourism, including international passenger transport, to over US\$ 1 trillion in 2007. In other words, almost US\$ 3 billion a day is earned by international tourism.

No significant changes in the top ten

Given the fact that the world's leading tourism destinations show marked differences in terms of the type of tourists they attract, as well as their average length of stay and their spending per night and per trip, it is interesting to note that eight of the top ten countries in the ranking of international tourist arrivals also appear in the top ten ranking of international tourism receipts. In the ranking of the 'World's Top Tourism Destinations' – both by international tourist arrivals and international tourism receipts – the first seven and eight destinations in each ranking maintained their positions in 2007. The top ten ranking of the world's major tourism earners showed only a minor change as Austria overtook Turkey, moving into ninth place. In terms of tourist arrivals, the Ukraine and Turkey, now in eighth and ninth positions respectively, ousted Austria and the Russian Federation from the top ten.

In terms of arrivals, France continues to hold onto its number one position ahead of Spain and the USA while, in the ranking for receipts, the same three countries appear in the top three places, but with the USA ranking first and France third, while Spain maintains second place. This highlights the fact that the USA attracts a greater share of higher-spending long-haul tourists than its European competitors, which rely more on short-haul tourism.

China, fourth in arrivals, remains fifth in terms of receipts, while the opposite is the case with Italy. The UK and Germany rank sixth and seventh, in that order, in terms of both arrivals and receipts, and the eighth to

World's Top

Tourism

Destinations

tenth places in terms of arrivals are now taken by the Ukraine, Turkey and Mexico, while Australia, Austria and Turkey close the top ten in terms of receipts. Nevertheless, due attention should be paid to the fact that receipts are expressed in US dollars and, as a result of to the considerable depreciation of the US currency during 2007, many destinations' receipts were magnified in dollar terms. The top ten tourism earners last year accounted for 50% of the total estimated US\$ 856 billion of international tourism receipts. Their respective share of international tourist arrivals was slightly lower, at 46%.

International Tourist Arrivals						International Tourism Receipts								
Rank	Series ¹	Million		Change (%)		Rank	US\$				Local currencies			
		2006	2007*	06/05	07*/06		Billion		Change (%)		change (%)			
		2006	2007*	06/05	07*/06		2006	2007*	06/05	07*/05	06/05	07*/06		
1	France	TF	78.9	81.9	3.9	3.8	1	United States	85.7	96.7	4.8	12.8	4.8	12.8
2	Spain	TF	58.2	59.2	4.1	1.7	2	Spain	51.1	57.8	6.6	13.1	5.6	3.6
3	United States	TF	51.0	56.0	3.6	9.8	3	France	46.3	54.2	5.3	17.0	4.3	7.2
4	China	TF	49.9	54.7	6.6	9.6	4	Italy	38.1	42.7	7.7	11.9	6.7	2.5
5	Italy	TF	41.1	43.7	12.4	6.3	5	China	33.9	41.9	15.9	23.5	15.9	23.5
6	United Kingdom	TF	30.7	30.7	9.3	0.1	6	United Kingdom	33.7	37.6	9.8	11.6	8.5	2.7
7	Germany	TCE	23.5	24.4	10.1	3.9	7	Germany	32.8	36.0	12.4	9.8	11.4	0.6
8	Ukraine	TF	18.9	23.1	7.4	22.1	8	Australia	17.8	22.2	5.8	24.7	7.3	12.2
9	Turkey	TF	18.9	22.2	-6.7	17.6	9	Austria	16.6	18.9	3.7	13.5	2.7	4.0
10	Mexico	TF	21.4	21.4	-2.6	0.3	10	Turkey	16.9	18.5	-7.2	9.7	-7.2	9.7

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2008)

Regional

Results

Europe – growth above expectations

Given that Europe is the world's largest and most mature destination region, accounting for over 54% of all international tourist arrivals and 51% of international tourism receipts, it posted strong results in 2007. International tourist arrivals increased by 5%, representing an additional 22 million arrivals. International tourism receipts grew at a slightly lower rate of 3% (in real terms) to US\$ 433 billion (316 billion euros).

The region's solid growth in arrivals in 2007 was due in significant part to Southern and Mediterranean Europe's strong performance (+7%). In particular, the Balkan states were among the stronger players – Serbia (+48%), Montenegro (+160%), Bosnia and Herzegovina (+20%), and the Former Yugoslav Republic of Macedonia (+14%). Slovenia (+8%) attributes its result to increased promotion in key markets whereas

Major destinations	Series ¹	International Tourist Arrivals						International Tourism Receipts			
		(1000)			Change (%)		Share (%)	(US\$ million)			Share (%)
		2005	2006	2007*	06/05	07*/06	2007*	2005	2006	2007*	2007*
Europe		440,308	462,176	484,407	5.0	4.8	100	350,282	376,945	433,404	100
Austria	TCE	19,952	20,269	20,766	1.6	2.5	4.3	16,054	16,643	18,887	4.4
Belgium	TCE	6,747	6,995	7,045	3.7	0.7	1.5	9,868	10,226	10,662	2.5
Bulgaria	TF	4,837	5,158	5,151	6.6	-0.1	1.1	2,430	2,588	3,130	0.7
Croatia	TCE	8,467	8,659	9,307	2.3	7.5	1.9	7,463	7,902	9,254	2.1
Czech Rep	TCE	6,336	6,435	6,680	1.6	3.8	1.4	4,661	5,520	6,618	1.5
France	TF	75,908	78,900	81,900	3.9	3.8	16.9	44,018	46,345	54,228	12.5
Germany	TCE	21,339	23,498	24,420	10.1	3.9	5.0	29,173	32,801	36,029	8.3
Greece	TF	14,765	16,039	17,518	8.6	9.2	3.6	13,731	14,259	15,513	3.6
Hungary	TF	9,979	9,260	8,638	-7.2	-6.7	1.8	4,111	4,233	4,728	1.1
Ireland	TF	7,333	8,001	..	9.1	..	..	4,806	5,346	6,066	1.4
Italy	TF	36,513	41,058	43,654	12.4	6.3	9.0	35,398	38,130	42,651	9.8
Netherlands	TCE	10,012	10,739	11,008	7.3	2.5	2.3	10,475	11,348	13,428	3.1
Poland	TF	15,200	15,670	14,975	3.1	-4.4	3.1	6,274	7,239	10,627	2.5
Portugal	TF	10,612	11,282	12,321	6.3	9.2	2.5	7,712	8,377	10,132	2.3
Russian Federation	TF	19,940	20,199	..	1.3	..	..	5,870	7,628	9,607	2.2
Spain	TF	55,914	58,190	59,193	4.1	1.7	12.2	47,970	51,122	57,795	13.3
Switzerland	THS	7,229	7,863	8,448	8.8	7.4	1.7	10,078	10,635	11,818	2.7
Turkey	TF	20,273	18,916	22,248	-6.7	17.6	4.6	18,152	16,853	18,487	4.3
Ukraine	TF	17,631	18,936	23,122	7.4	22.1	4.8	3,125	3,485	4,597	1.1
United Kingdom	TF	28,039	30,654	30,677	9.3	0.1	6.3	30,675	33,695	37,617	8.7

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2008)

* = provisional figure or data; .. = figure or data not (yet) available; I = change of series.

¹ 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.

growth to Croatia (+7%), on a much larger base, was driven by increased access to low-cost carriers (LCCs) and a booming second-home market. Among Europe's leading sun and beach destinations, Turkey (+18%) staged a solid recovery in 2007 following a decline in 2006, while Greece and Portugal (+9% each) consolidated their 2006 growth. Finally, the subregion's two leading tourism destinations, Italy (+6%) and Spain (+2%), also made significant contributions to the growth in the Mediterranean.

Increases for all other subregions were more modest by comparison. Western Europe managed +4%, Northern Europe +2%, sharply down on previous year's 7% increase. Among the Nordic countries, Sweden (+10%) achieved the highest growth, followed by Iceland (+9%). Switzerland (+7%) was one of the best performers in Western Europe in 2007. France (+4%) held up well to its 2006 growth rate while Germany (also at +4%) reports as expected a slower increase than in the previous year when it hosted the FIFA World Cup. Growth in Central and Eastern Europe (+5%) was close to the regional average, with some wide variations from one destination to another.

Asia and the Pacific – sustaining the robust growth of previous years

Asia and the Pacific was the world's second best performing region in terms of arrivals in 2007 after the Middle East, recording an increase by 10% to 184 million arrivals. And it also included two of the world's best performing subregions – South-East Asia (+12%) and North-East Asia (+11%). Only one subregion, Oceania (+2%), was well under the regional average. Results in receipts were also quite above average as Asia and the Pacific (+11% in real terms) reported the highest growth of all world regions, to a total of US\$189 billion. And again, as was the case with arrivals, South-East (+13%) and North-East Asia (12%) were the fastest growing subregions worldwide.

In North-East Asia, Macao (China) led for the second year (+21%) the growth in arrivals. China (+10%) continues to reinforce its position as one of the world's tourism leaders, both as an outbound and as an inbound market. Japan (+14%) was one of the beneficiaries of China's outbound travel growth. Hong Kong (China) (+8%) also had a good year, boosted primarily by the double-digit increase in visitors from the Chinese mainland. In South-East Asia, strong growth continued in the countries of Indochina: Lao P.D.R. (+34% in visitors), Cambodia (+18%) and Vietnam (+16%). Malaysia (+20%) was also well above average. Indonesia's results (+13%) were boosted by a resurgence of demand to Bali while the Philippines' 9% growth, though significant, is slightly lower than targeted due to supply constraints, particularly in terms of airline capacity.

South Asia recorded an 8% growth in arrivals in 2007, with India and the Maldives (+12% each) sustaining above average growth. In Oceania (+2%), Australia (+2% in visitors) did slightly better than in 2006, despite increases in travel costs due to a stronger currency, higher fuel prices and high load factors on inbound air routes. For New Zealand (+2%), growth was much in line with its 2006 results.

Major destinations	Series ¹	International Tourist Arrivals						International Tourism Receipts			
		(1000)			Change (%)		Share (%)	(US\$ million)			Share (%)
		2005	2006	2007*	06/05	07*/06	2007*	2005	2006	2007*	2007*
Asia and the Pacific		154,641	166,981	184,329	8.0	10.4	100	134,964	156,537	188,934	100
Australia	TF	5,020	5,064	..	0.9	..	..	16,866	17,840	22,244	11.8
Cambodia	TF	1,333	1,591	1,873	19.4	17.7	1.0	840	963	1,400	0.7
China	TF	46,809	49,913	54,720	6.6	9.6	29.7	29,296	33,949	41,919	22.2
Fiji	TF	550	545	539	-0.9	-1.1	0.3	439	433	..	..
Guam	TF	1,228	1,212	1,225	-1.3	1.1	0.7	..	..	..	..
Hong Kong (China)	TF	14,773	15,822	17,154	7.1	8.4	9.3	10,294	11,638	13,766	7.3
India	TF	3,919	4,447	4,977	13.5	11.9	2.7	7,493	8,634	10,729	5.7
Indonesia	TF	5,002	4,871	5,506	-2.6	13.0	3.0	4,521	4,448	5,346	2.8
Japan	VF	6,728	7,334	8,347	9.0	13.8	4.5	6,630	8,469	9,334	4.9
Korea, Republic of	VF	6,023	6,155	6,448	2.2	4.8	3.5	5,806	5,788	5,797	3.1
Lao P.D.R.	TF	672	842	..	25.3	..	..	147	173	..	..
Macao (China)	TF	9,014	10,683	12,945	18.5	21.2	7.0	7,979	9,828	..	..
Malaysia	TF	16,431	17,547	20,973	6.8	19.5	11.4	8,847	10,424	14,047	7.4
Maldives	TF	395	602	676	52.3	12.3	0.4	287	434	494	0.3
New Zealand	VF	2,383	2,422	2,466	1.6	1.8	1.3	4,865	4,750	5,427	2.9
Philippines	TF	2,623	2,843	3,092	8.4	8.7	1.7	2,265	3,501	4,931	2.6
Singapore	TF	7,079	7,588	7,957	7.2	4.9	4.3	5,914	7,194	8,664	4.6
Taiwan (pr. of China)	VF	3,378	3,520	3,716	4.2	5.6	2.0	4,977	5,136	5,137	2.7
Thailand	TF	11,567	13,822	14,464	19.5	4.6	7.8	9,576	13,401	15,573	8.2
Vietnam	VF	3,468	3,583	4,172	3.3	16.4	2.3	1,880	3,200	3,461	1.8

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2008)

¹ See note on page 5.

Regional

Results

Americas – boosted by the strong performance of the USA, Central & South America

International tourist arrivals in the Americas grew above expectations in 2007. The 5% increase in North America, which accounts for as much as 67% of the regional total, and the good results of Central and South America, pushed America's overall arrivals up by 5% to 142 million. Growth in receipts followed closely at +6% (in real terms), again boosted by increases in North, Central and South America. International tourism receipts for the Americas totalled US\$ 171 billion in 2007, representing 20% of the world' total.

Central and South America led the Americas in terms of international arrivals growth in 2007, with +10% and +6%, respectively. In Central America, Panama (+31%) was one of the best performers, followed by Costa Rica (+14%) and Honduras (+13%). In South America, the best performances came from Colombia and Ecuador (+13% each). Chile (+11%) enjoyed continued prosperity and investments in new products, which stimulated growth in arrivals from neighbouring and long-haul markets. 2007 proved an excellent year as well for Peru (+11%) which received much favourable press about Machu Picchu. Argentina (+9%) owes its strong performance to, among other factors, a favourable exchange rate.

The subregion recording the most surprising performance was North America, up 5%, as against +1% in 2006. North America's sharply improved results are in most part due to the long overdue tourism recovery of the USA (+10%). Growth is attributed not just to the depreciation of the US dollar, but also to a decline in visa wait times, as well as to a clarification of the rules about what documents were needed to enter the country.

Arrivals in the Caribbean, on the other hand, were stagnant (+0.1%). These weaker results can be blamed in large part on the new rules for the Western Hemisphere Travel Initiative (WHTI), requiring passports for US and non-US air travel to and from the USA and Canada, Mexico and the Caribbean.

Major destinations	Series ¹	International Tourist Arrivals					International Tourism Receipts				
		(1000)			Change (%)		(US\$ million)			Share (%)	
		2005	2006	2007*	06/05	07*/06	2005	2006	2007*	2007*	
Americas		133,357	135,846	142,494	1.9	4.9	100	145,321	154,104	171,137	100
Argentina	TF	3,823	4,173	4,562	9.2	9.3	3.2	2,729	3,344	4,313	2.5
Bahamas	TF	1,608	1,601	1,528	-0.5	-4.6	1.1	2,069	2,056	2,187	1.3
Brazil	TF	5,358	5,017	5,026	-6.4	0.2	3.5	3,861	4,316	4,953	2.9
Canada	TF	18,771	18,265	17,931	-2.7	-1.8	12.6	13,760	14,632	15,486	9.0
Chile	TF	2,027	2,253	2,507	11.1	11.3	1.8	1,109	1,222	1,419	0.8
Colombia	VF	933	1,053	1,193	12.9	13.2	0.8	1,222	1,554	1,669	1.0
Costa Rica	TF	1,679	1,725	1,973	2.7	14.4	1.4	1,671	1,732	1,974	1.2
Cuba	TF	2,261	2,150	2,119	-4.9	-1.4	1.5	2,150	1,969	1,982	1.2
Dominican Rep.	TF	3,691	3,965	3,980	7.4	0.4	2.8	3,518	3,917	4,026	2.4
Ecuador	VF	860	841	953	-2.2	13.4	0.7	486	490	637	0.4
El Salvador	TF	1,127	1,279	1,339	13.5	4.7	0.9	543	793	847	0.5
Guatemala	TF	1,298	1,482	1,448	14.2	-2.3	1.0	869	1,013	1,199	0.7
Honduras	TF	673	739	831	9.8	12.6	0.6	463	488	557	0.3
Jamaica	TF	1,479	1,679	1,704	13.5	1.5	1.2	1,545	1,870	1,841	1.1
Mexico	TF	21,915	21,353	21,424	-2.6	0.3	15.0	11,803	12,177	12,901	7.5
Nicaragua	TF	712	749	800	5.2	6.8	0.6	206	231	255	0.1
Panama	TF	702	843	1,103	20.1	30.8	0.8	780	960	1,185	0.7
Peru	TF	1,486	1,635	1,812	10.0	10.9	1.3	1,308	1,577	1,938	1.1
Puerto Rico	TF	3,686	3,722	3,687	1.0	-0.9	2.6	3,239	3,369	3,414	2.0
United States	TF	49,206	50,977	55,986	3.6	9.8	39.3	81,799	85,720	96,712	56.5
Uruguay	TF	1,808	1,749	1,752	-3.2	0.2	1.2	594	598	809	0.5
Venezuela	TF	706	748	771	5.9	3.0	0.5	650	768	817	0.5

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2008)

¹ See note on page 5.

Africa – confirming the good momentum

Africa was one of the best performers in 2007, with a growth of 7% to 44 million arrivals. The region confirmed its good momentum averaging 7% growth a year since 2000. International tourism receipts increased by 8% (in real terms) and reached US\$ 28 billion.

In North Africa, Morocco continued to advance its arrivals with a 13% rise in 2007. Algeria also did well (+6%), especially in the adventure tourism segment. In Sub-Saharan Africa, a number of countries, among the ones with data available, turned in double-digit results, notably Angola (+60%), Cape Verde and Madagascar (+10% each), Malawi (+12%), Mauritius (+15%), Reunion (+36%), the Seychelles (+15%), Tanzania

(+10%) and Uganda (+19%). South Africa (+8%), the leading destination in Africa with 20% of all arrivals to the region, benefited from the devaluation of the rand and increased marketing in core markets, with a focus on segments like sports and adventure tourism. Awareness of the destination continues to grow in the build-up to its hosting of the FIFA World Cup in 2010.

Regional

Results

Major destinations	Series ¹	International Tourist Arrivals					International Tourism Receipts				
		(1000)			Change (%)		(US\$ million)			Share (%)	
		2005	2006	2007*	06/05	07*/06	2007*	2005	2006	2007*	2007*
Africa		37,260	41,369	44,430	11.0	7.4	100	21,820	24,602	28,292	100
Algeria	VF	1,443	1,638	1,743	13.5	6.4	3.9	184	215	..	..
Angola	TF	210	121	194	-42.2	59.8	0.4	88	75	..	..
Botswana	TF	1,675	..	..	..	..	..	562	537	546	1.9
Cape Verde	TF	198	242	267	22.2	10.4	0.6	127	228	344	1.2
Ethiopia	TF	227	290	303	27.7	4.3	0.7	168	162	177	0.6
Ghana	TF	429	497	..	16.0	..	..	836	861	..	..
Kenya	TF	1,536	1,644	..	7.0	..	..	579	688	909	3.2
Lesotho	VF	304	357	300	17.6	-15.9	0.7	31	36	..	..
Madagascar	TF	277	312	344	12.4	10.4	0.8	183	159	176	0.6
Malawi	TF	438	638	714	45.8	11.9	1.6	24	24	..	..
Mali	TF	143	153	164	6.9	7.4	0.4	148	175	..	..
Mauritius	TF	761	788	907	3.6	15.1	2.0	871	1,007	1,299	4.6
Morocco	TF	5,843	6,558	7,408	12.2	12.9	16.7	4,621	5,967	7,264	25.7
Namibia	TF	778	833	..	7.1	..	..	348	384	434	1.5
Reunion	TF	409	279	381	-31.8	36.5	0.9	442	309	446	1.6
Senegal	TF	769	866	..	12.6	..	..	242	250	..	..
Seychelles	TF	129	141	161	9.3	14.7	0.4	192	228	285	1.0
South Africa	TF	7,369	8,396	9,090	13.9	8.3	20.5	7,327	7,875	8,418	29.8
Sudan	TF	246	328	..	33.5	..	..	252	262	0.9	..
Swaziland	THS	839	873	870	4.1	-0.4	2.0	78	74	..	..
Tanzania	TF	590	628	692	6.4	10.2	1.6	824	950	1,037	3.7
Tunisia	TF	6,378	6,550	6,762	2.7	3.2	15.2	2,143	2,275	2,555	9.0
Uganda	TF	468	539	642	15.1	19.2	1.4	380	309	356	1.3
Zambia	TF	669	757	897	13.2	18.5	2.0	98	110	..	..
Zimbabwe	VF	1,559	2,287	..	46.7	..	..	99	338	..	..

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2008)

¹ See note on page 5.

Middle East – visitor numbers continue to climb well above average

The Middle East continues to be one of the tourism success stories of the decade so far and leads the growth ranking of arrivals in 2007, with an estimated 16% rise to almost 48 million tourists. The star performers were the two top regional destinations: Saudi Arabia (+34%) and Egypt (+23%). Growth in international tourism receipts was more modest, though, with a 6% increase in real terms to US\$ 34 billion.

Major destinations	Series ¹	International Tourist Arrivals					International Tourism Receipts				
		(1000)			Change (%)		(US\$ million)			Share (%)	
		2005	2006	2007*	06/05	07*/06	2007*	2005	2006	2007*	2007*
Middle East		37,842	40,930	47,633	8.2	16.4	100	27,250	29,881	34,212	100
Bahrain	TF	3,914	4,519	..	15.5	..	..	920	1,048	1,105	3.2
Egypt	TF	8,244	8,646	10,610	4.9	22.7	22.3	6,851	7,591	9,303	27.2
Jordan	TF	2,987	3,547	3,431	18.8	-3.3	7.2	1,441	2,060	2,312	6.8
Lebanon	TF	1,140	1,063	1,017	-6.7	-4.3	2.1	5,532	5,015	..	..
Qatar	TF	913	946	964	3.6	1.9	2.0	760	874	..	..
Saudi Arabia	TF	8,037	8,620	11,531	7.3	33.8	24.2	5,418	4,961	5,228	15.3
Syrian Arab Rep.	TCE/TF	3,368	4,422	4,566	31.3	3.3	9.6	1,944	2,025	..	..
Untd. Arab. Emirates	THS	7,126	..	..	..	..	..	3,218	4,972	..	..
Yemen	THS	336	382	379	13.8	-0.8	0.8	181	181	..	..

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2008)

¹ See note on page 5.

Emerging source markets sustain their above average growth

While as much as 80% of international travel takes place within the same region, travel between different regions tends to grow at a faster rate than intraregional travel. In 2007, interregional travel increased by 8% as against a growth of 6% for intraregional traffic. In terms of source markets, international tourism is still largely 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 over recent years, in particular markets in North-East and South-East Asia, Central and Eastern Europe, the Middle East, Southern Africa and South America. In 2007, the Middle East recorded by far the biggest gain in relative terms (+14%), followed by Asia and the Pacific (+10%). The Americas continued its recovery (+5%), while arrivals originating from Europe grew by 6%. Most interestingly, the Middle East was the fastest growing source region over the last seven years, recording an average annual increase of 11%, followed by Africa and Asia and the Pacific, both with a 7% average annual increase.

	International Tourist Arrivals (million)						Share (%) 2007*	Change (%)		Average annual growth (%) '00-'07*
	1990	1995	2000	2005	2006	2007*		2006/05	2007*/06	
World	436	536	683	803	847	903	100	5.5	6.6	4.1
From:										
Europe	252.7	311.4	399.2	455.3	475.2	502.0	55.6	4.4	5.6	3.3
Asia and the Pacific	58.9	86.2	113.9	154.0	165.9	181.9	20.1	7.7	9.6	6.9
Americas	99.8	108.4	131.0	135.8	142.8	149.7	16.6	5.1	4.8	1.9
Middle East	8.2	9.6	13.8	22.6	24.3	27.8	3.1	7.5	14.3	10.6
Africa	9.9	12.8	16.3	21.8	24.9	26.7	3.0	14.0	7.3	7.4
Origin not specified ¹	6.6	7.5	9.2	13.9	14.2	15.2	1.7	2.6	7.1	7.4
Same region	349.9	431.4	541.0	638.0	668.9	710.2	78.6	4.9	6.2	4.0
Other regions	79.5	97.1	133.1	152.3	164.2	177.9	19.7	7.8	8.3	4.2

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO, 2008)

¹ 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's top spenders – China continues to rise up in the ranking

In the 2007 ranking of international tourism spenders the major change comes from China, which overtook Japan, after having overtaken Italy in 2006, and which is now in fifth place with an expenditure on tourism abroad of nearly US\$ 30 billion. Japan was also overtaken by Italy, moving Italy back into the sixth place. As a result, Japan moved from fifth to seventh position, having been the world's third largest spender only ten years ago. The first four places remain unchanged with Germany leading (US\$ 83 billion), followed by the USA, the UK and France. Closing the top ten, the Russian Federation now ranks ahead of the Republic of Korea, in ninth position, following its 22% growth in spending abroad in 2007. Among the world's top ten spenders, apart from the Russian Federation, the strongest growth came from China (+23%), Canada (+14%) and the Republic of Korea (+11%). Only one market, Japan, recorded negative growth (-0.2% in yen). Among the other source countries in the top ten, Germany, the world's major spender on tourism, turned in the weakest performance (but this was still +3% in euro terms), with the remainder achieving increases of between 5% and 8% for the year. 2007 was another strong year for emerging markets. Outside the top ten, source countries that increased international tourism expenditure by over 15% were Saudi Arabia, Brazil, Egypt, Malaysia, Hungary, Argentina, Indonesia, South Africa, Turkey, the Czech Republic, Ireland and the Ukraine.

Rank		International Tourism Expenditure (US\$ billion)		Local currencies change (%)		Market share (%) 2007*	Population 2007 (million)	Expenditure per capita (US\$)
		2006	2007*	2006/2005	2007*/2006			
	World	742	856			100	6,586	130
1	Germany	73.9	82.9	-1.5	2.7	9.7	82	1,008
2	United States	72.1	76.2	4.5	5.6	8.9	302	252
3	United Kingdom	63.1	72.3	4.6	5.4	8.5	61	1,189
4	France	31.2	36.7	1.2	7.8	4.3	62	595
5	China	24.3	29.8	11.8	22.5 (\$)	3.5	1,321	23
6	Italy	23.1	27.3	2.2	8.4	3.2	59	464
7	Japan	26.9	26.5	3.8	-0.2	3.1	128	207
8	Canada	20.5	24.8	5.7	14.4	2.9	33	755
9	Russian Federation	18.2	22.3	4.6	22.1 (\$)	2.6	142	157
10	Korea, Republic of	18.9	20.9	22.4	10.8 (\$)	2.4	48	431

Source: World Tourism Organization (UNWTO) ©

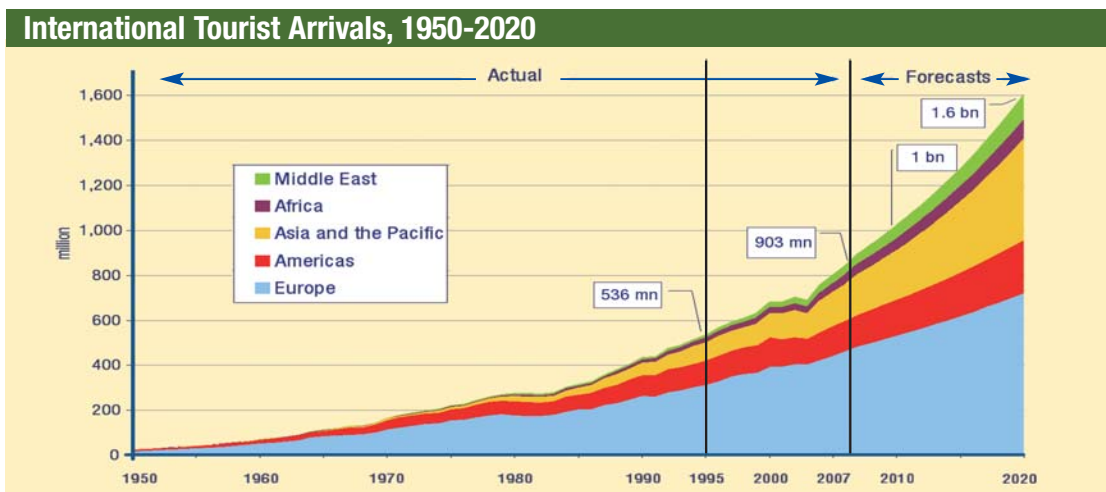
(Data as collected by UNWTO, 2008)

(\$) = percentage derived from series in US\$ instead of local currency

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 2010 and 2020.

Although the evolution of tourism in the last years has been irregular, UNWTO 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, 2004 to 2007) alternate with periods of slow growth (2001 to 2003). And, the actual pace of growth is in reality in line with the *Tourism 2020 Vision* forecast as international tourist arrivals show an average growth of 4.2% between 1995 and 2007.



Source: World Tourism Organization (UNWTO) ©

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.

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 year, compared to the world average of 4.1%. 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% in 1995 to 46% in 2020.

International Tourist Arrivals by Region (million)

	Base Year	Forecasts		Average annual growth rate (%)	Share (%)	
	1995	2010	2020		1995-2020	1995	2020
Total	565	1,006	1,561	4.1	100	100
Africa	20	47	77	5.5	3.6	5.0
Americas	109	190	282	3.9	19.3	18.1
East Asia/Pacific	81	195	397	6.5	14.4	25.4
Europe	338	527	717	3.0	59.8	45.9
Middle East	12	36	69	7.1	2.2	4.4
South Asia	4	11	19	6.2	0.7	1.2
Intraregional (a)	464	791	1,183	3.8	82.1	75.8
Long-haul (b)	101	216	378	5.4	17.9	24.2

Source: World Tourism Organization (UNWTO) ©

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



Youth Travel Matters – Understanding the Global Phenomenon of Youth Travel

Youth Travel Matters – Understanding the Global Phenomenon of Youth Travel offers a global overview of the youth and student travel industry, by revealing the latest trends in youth travel destinations, products and innovations. The report, developed by UNWTO and the World Youth Student & Educational Travel Confederation (WYSE Travel Confederation) shows that the motivations of young travellers

make this market extremely important to the key objectives of the global tourism agenda. The value of youth, student and educational travel is being recognised by educational institutions, employers, official tourism organisations and governments worldwide. This report explains the uniqueness of this segment, its wish to explore and engage with cultures. It focuses on the special mix of their travel ambitions with study, work, volunteer placements and adventure.

Available in English

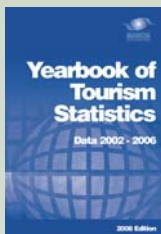


Handbook on Tourism Market Segmentation – Maximising Market Effectiveness

Market segmentation is crucial for National Tourism Organizations (NTO) and Destination Marketing Organizations (DMO) in making sure that their resources are used in the most effective way. This new UNWTO/ETC manual, aimed ultimately at helping destinations improving their marketing effectiveness, is divided into four distinct sections. The first sets out the theory and rationale for segmentation. Other areas look at the current methods and practices, detailing

some of the main methodologies; at practical steps to introducing or developing further segmentation-based marketing activities, and finally at best practices in the area of tourism market segmentation, including the analyses of a number of case studies.

Available in English



Yearbook of Tourism Statistics Data 2002 – 2006

The 2008 edition of the Yearbook of Tourism Statistics provides for 204 countries and territories data on total arrivals and overnight stays associated to inbound tourism with breakdown by country of origin for the period 2002 – 2006.

The titles of the tables are in English only. Notes are given in English, French and Spanish. Names of countries, regions and sub-regions as well as the classification included on the tables

are in English only. Countries are classified in accordance with English alphabetical order.

Trilingual (English, French and Spanish)



UNWTO World Tourism Barometer

The *UNWTO World Tourism Barometer* offers a unique overview of short-term international tourism trends, updated three times a year. It is developed by UNWTO with the aim to provide all those directly or indirectly involved in tourism with adequate up-to-date statistics and analysis in a timely fashion. Each issue contains three regular sections: an overview of short-term tourism trends including data on international tourist arrivals, tourism receipts and expenditure for over 100 countries worldwide and data on air transport on major routes;

a retrospective and prospective evaluation of current tourism performance by the members of the UNWTO Panel of Tourism Experts; and selected economic data relevant for tourism. The UNWTO World Tourism Barometer is published in January, June and October.

Available in English, French and Spanish



Cruise Tourism – Current Situation and Trends

Over the past years, worldwide demand for cruise tourism has posted some of the biggest gains within the tourism sector. The constant dynamism in cruise activity, as well as the increasing number of countries that include cruises as a key product for their tourism development, has led to update and expand the first edition of the UNWTO study on cruise tourism (2003). This new study discusses subjects like the current supply and demand for cruises as well as the characteristics, trends. A new element includes the relationship between destinations and cruise lines, analysing key factors such as

legislation, promotion and the economic impact of cruises through reference cases. It presents current trends in this industry in terms of innovation, safety and security, and sustainability, and identifies the major lines that will shape the sector.

Available in Spanish



Structures and Budgets of National Tourism Organizations, 2004 – 2005

Structures and Budgets of National Tourism Organizations (NTOs) is a benchmarking reference tool on inbound tourism promotion. The report compiles and analyses updated and comparable information on the budgets that NTOs allocate for the promotion of inbound tourism as well as their structure, functions and forms of operation in order to illustrate different forms of NTO organization and possible action in the area of

inbound tourism promotion. The first part of the report is focused on the NTOs structure and functioning. The second part presents an overall view of NTO budgets for around 50 countries.

Available in English, French, Spanish and Russian



Compendium of Tourism Statistics Data 2002 – 2006

The Compendium is designed to provide a condensed and quick-reference guide on the major tourism statistical indicators in each country. The 2008 edition provides statistical information on tourism in 208 countries and territories around the world for the period 2002 – 2006. It is edited in English only, with countries classified according to English alphabetical order. For easy reference in Arabic,

French, German, Russian and Spanish, the text of the basic indicators and the basic references has been printed in a separate pasteboard.

Multilingual (English, French, Russian, Spanish, Arabic, German)



Tourism Market Trends, 2007 Edition

Tourism Market Trends is UNWTO's regular series of reports with a comprehensive and timely analysis of international tourism trends in the world and the various regions, subregions and countries. The series examines short- and medium-term tourism development and analyzes statistical information on a set of indicators including international tourist arrivals, international tourism receipts, arrivals by region of origin, purpose of visit and means of transport, volume of trips abroad, international tourism expenditure, etc.

The full series consists of one volume providing an overview of the tourism trends in the world, *World Overview & Tourism Topics*, and five regional and subregional volumes presenting for each country a digest of statistical data as well as an evaluation of the past year.

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